BEACON SAP Training

BEACON North Carolina Office of the State Controller

Create and Maintain Employee Data PA310

SLIDE 1

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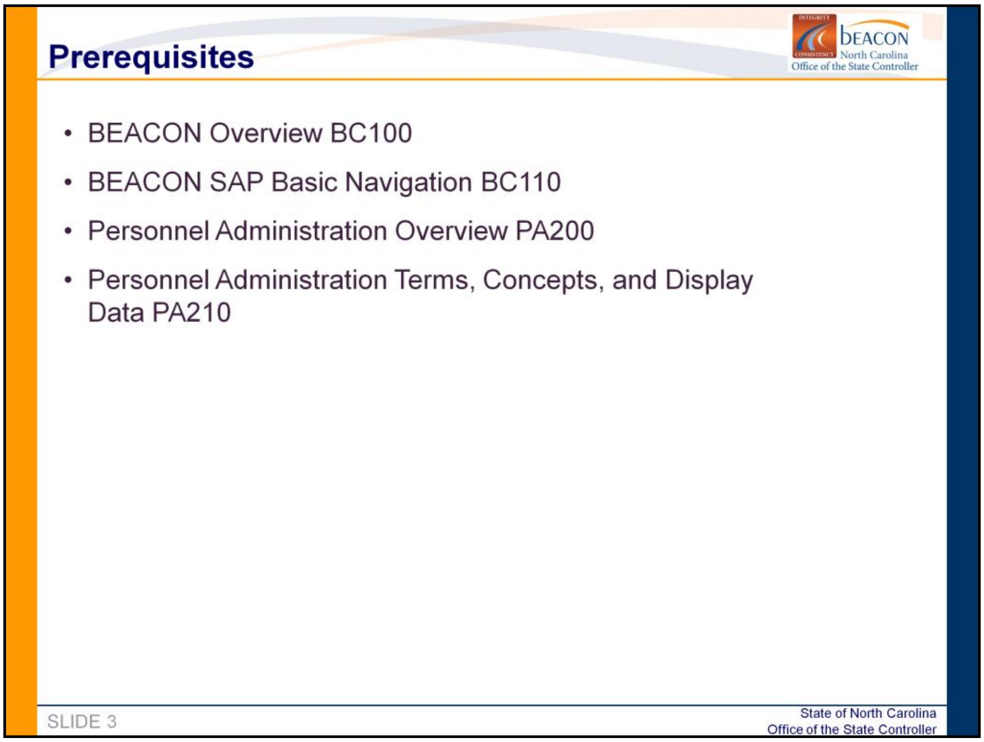
Office of the State Controller

Notes

Notes

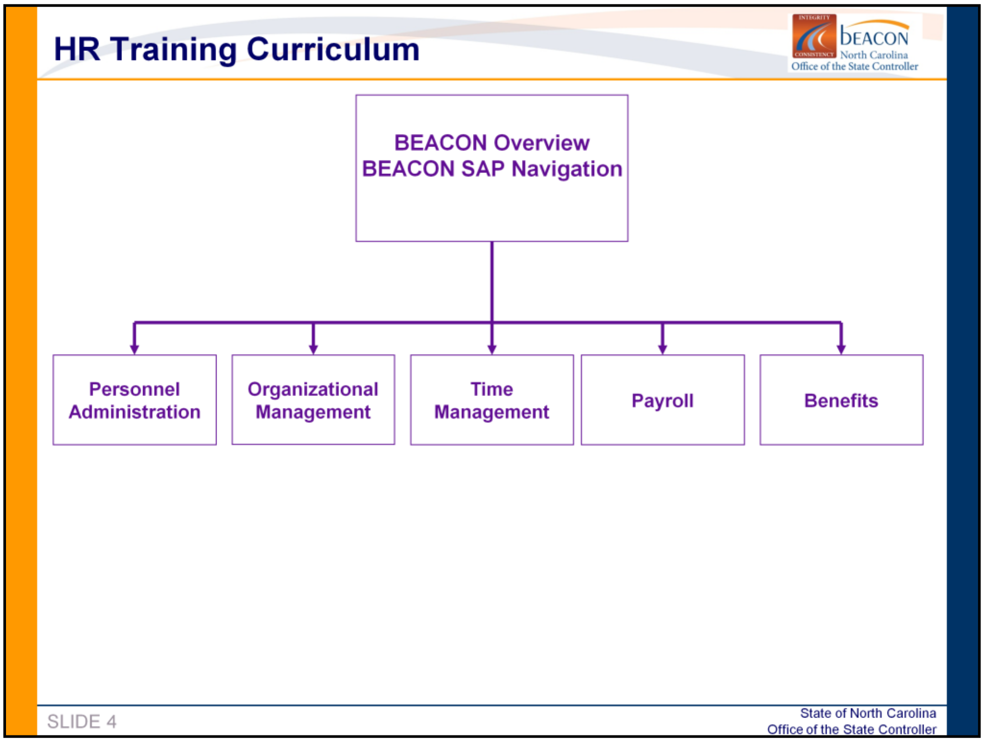
The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The Instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive credit for attending class by signing the attendance sheet.



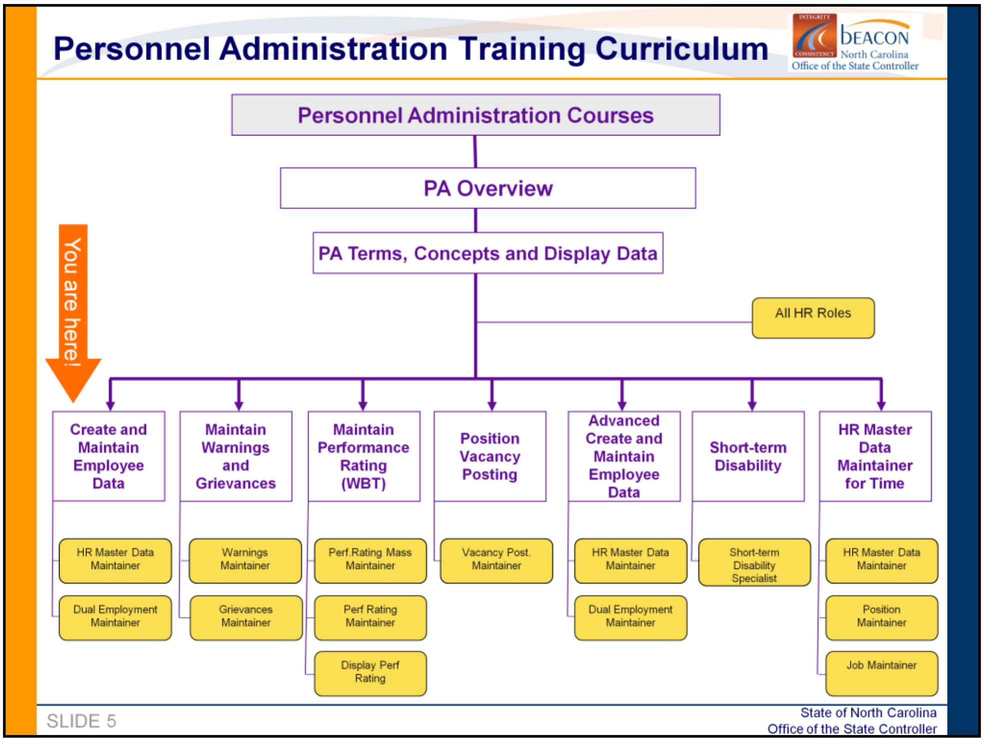
There are four prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Create and Maintain Employee Data* course.

Notes



Notes

The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.



Notes

Within the Personnel Administration module, there are several courses. Everyone attends the first course, Personnel Administration Overview. Your position determines which additional courses you may be required to attend.

In addition to the above courses, there are several web-based courses available:

- BEACON Overview
- Basic Navigation
- Personnel Administration Overview (PA200)


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Personnel Administration Review
Lesson 2: Introduction to Actions
Lesson 3: Entering Employees into BEACON SAP
Lesson 4: Adjusting Salaries
Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
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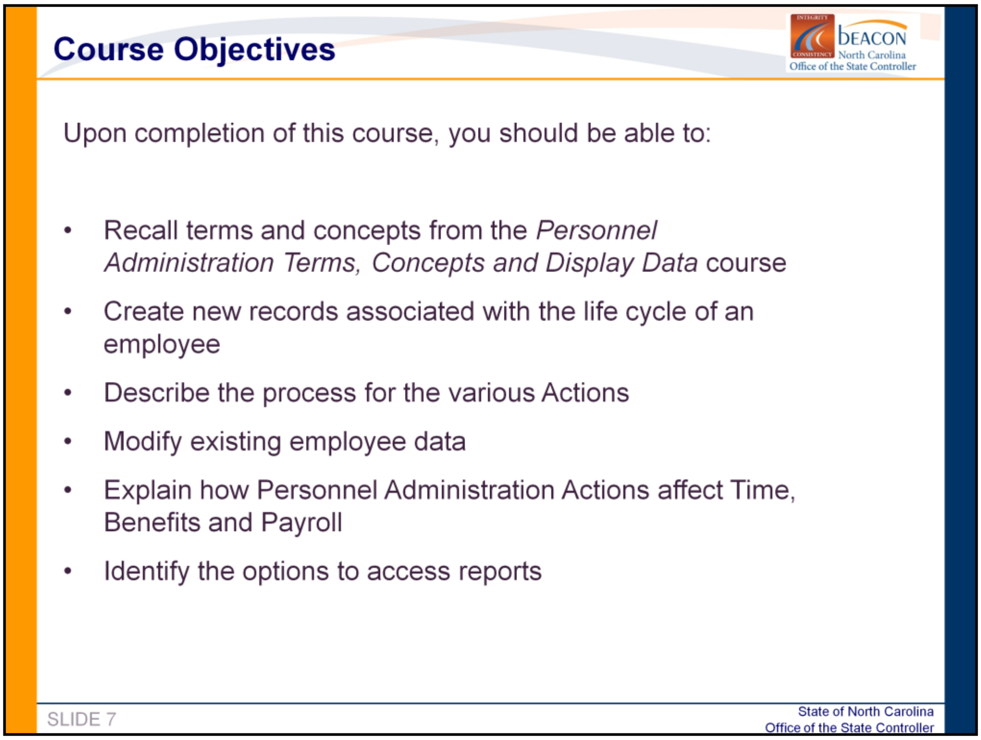
Notes


Course Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this course, you should be able to:
• Recall terms and concepts from the *Personnel Administration Terms, Concepts and Display Data* course
• Create new records associated with the life cycle of an employee
• Describe the process for the various Actions
• Modify existing employee data
• Explain how Personnel Administration Actions affect Time, Benefits and Payroll
• Identify the options to access reports
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Notes

Course Results: (1 of 3)

Lesson 1: Review

- An activity designed to review of the terms and concepts presented in *PA210 PA Terms, Concepts and Display Data*

Lesson 2: Introduction to Actions

- Conceptual information about entering Actions into BEACON SAP

Lesson 3: Entering Employees into BEACON SAP

- Hire a new employee into a vacant Position
- Hire a federal employee into a vacant Position
- Reinstate an employee to the same Position (which is vacant)

Lesson 4: Adjusting Salaries

- Adjust the salary of an employee
- Make an appointment change with salary adjustment
- Create a range revision (funds are available)

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Notes

Course Results: (2 of 3)

BEACON North Carolina Office of the State Controller

Lesson 5: Promoting Employees

– Promote an employee to a higher grade position with an increase in salary

Lesson 6: Separating Employees

– Separate an employee who is not receiving pay continuation

Lesson 7: Updating Employee Data

- Education
- Bank Details
- Objects on Loan
- Wage Maintenance (Balances)
- Adjustment Reasons
- Family Members/Dependents
- Correct a record
- Create a Range Revision (no funds)
- Separate an employee receiving pay continuation

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Notes

Course Results (3 of 3)

Lesson 8: Updating Benefits Adjustments

– Create a benefits infotype

Lesson 9: Connecting the BEACON Dots

– Change a work schedule rule

– Change position infotypes

Lesson 10: HR Reports Overview

– Run the Employee List report

Lesson 11: Course Materials Overview

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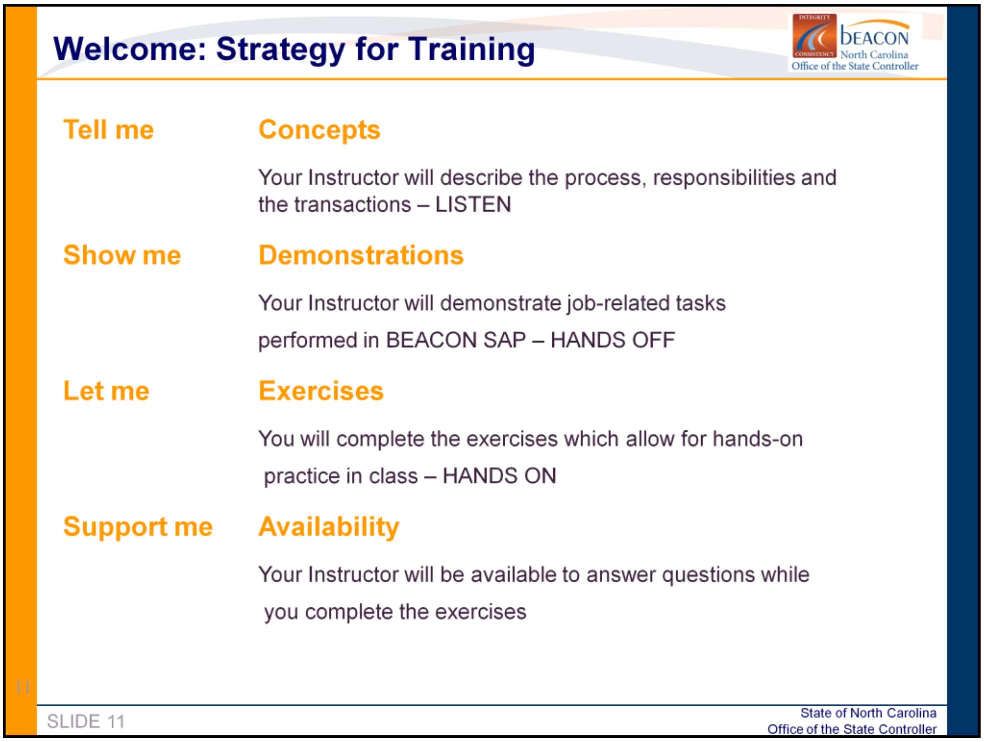
Notes



Notes

The *Create and Maintain Employee Data* Student Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the BEACON SAP training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.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Lesson 11: Course Review
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Notes

Lesson Objectives

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Upon completion of this lesson, you should be able to:

- Recall terms and concepts from the *PA210 Terms, Concepts, and Display Data* course.
- Identify that entries made in PA affect an employee's time, benefits or pay

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Notes

Instructor Demonstration

Review: *PA210 Terms, Concepts, and Display Data* Activity Team Feud

- Instructor will access IT0001-Organizational Assignment
- Each field on IT0001 will be discussed
- The fields result from PA entries and impact time, benefits, and payroll
  - See subsequent pages for detailed descriptions of each field

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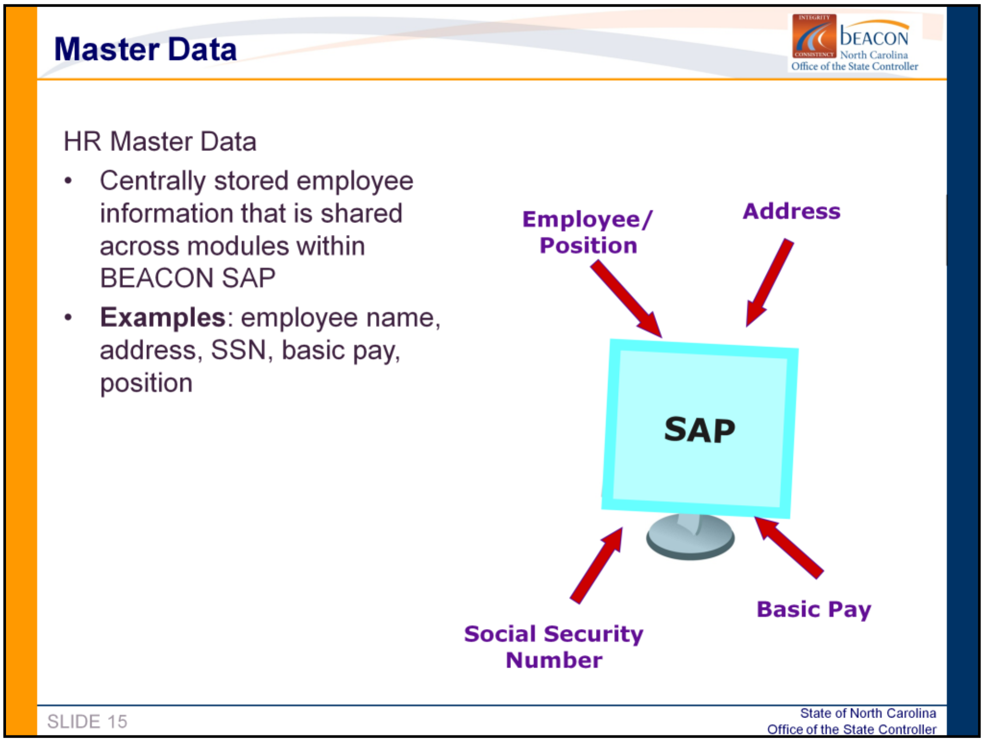
Notes

IT0001 is used as a review of the terms and concepts discussed in PA210 because the infotype provides a comprehensive view of the employee and the organization. The subsequent pages in this lesson contain a detailed description of each area the instructor will discuss.

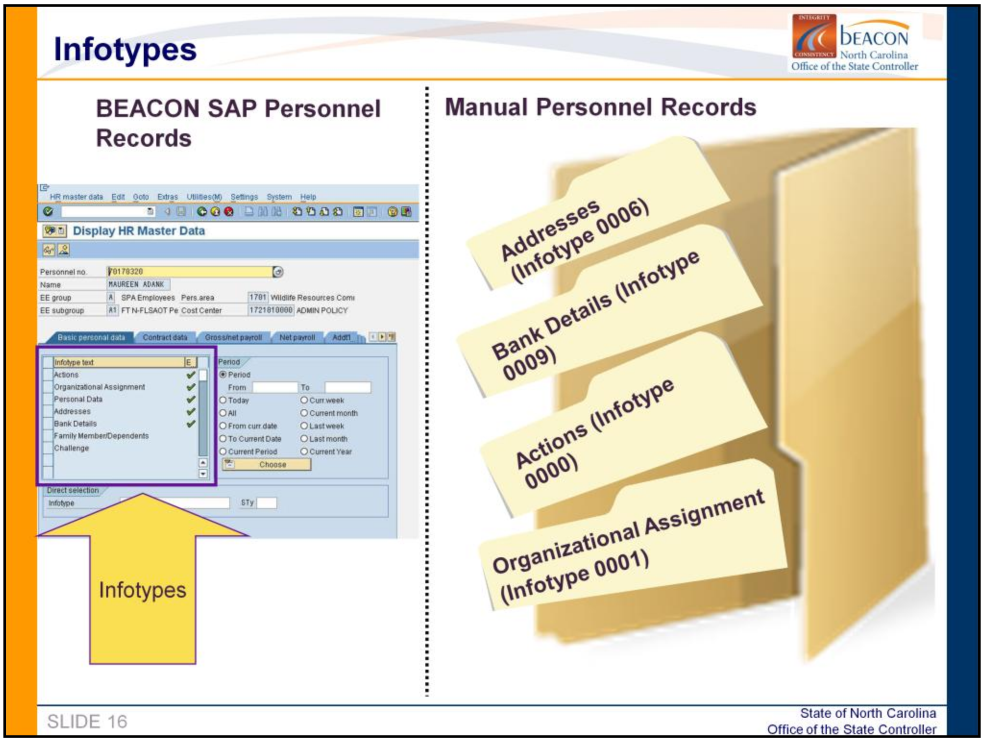
All of the fields shown on IT0001 result from entries made by Personnel Administration and affect an employee’s time, benefits or pay. Therefore it is important that Personnel Administration staff understand the relationship between these fields and how they impact the employee.



Notes

BEACON SAP stores employee data, called **Master Data**, in a central database that can be shared across all BEACON modules. Master Data contains the employee's personal, position, and organizational related information and includes all of the data required for processing benefits, time, and payroll. Master Data represents individual entries such as employee name, address, and basic pay.

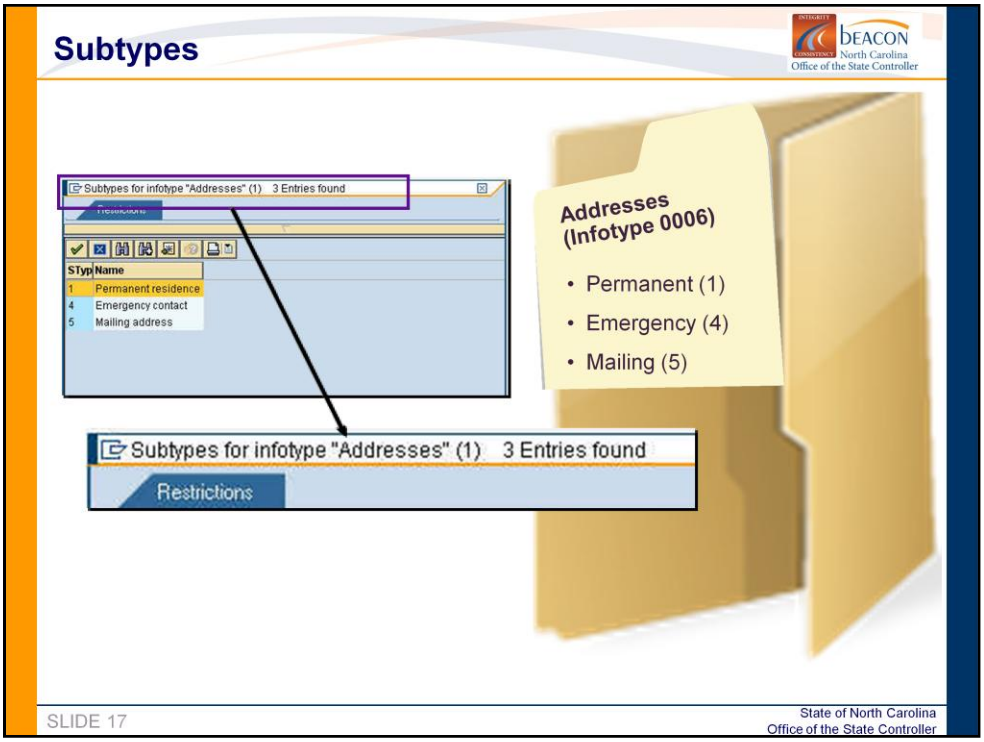
Generally, Master Data is information that remains the same over a long period of time. Since BEACON SAP is integrated with other modules, those modules can use HR Master Data as applicable. This eliminates duplicate data entry. Likewise, HR can use Master Data associated with other modules.



Notes

Employee Master Data is organized into **infotypes**. Infotype is the term BEACON SAP uses to identify the screens that make up an employee's personnel file. Just as you would have individual pieces of paper in a file folder to comprise a manual personnel record, you will now have electronic infotypes to comprise a personnel record. Just think of an infotype as a screen of information.

Infotypes are used to group related data fields together to form units of information in the HR module. Infotypes form the basis of the actions and sequencing that allow for easier and faster data entry and updates.



Notes

A **subtype** is an expansion of an infotype to hold additional screens of information. For example, the State of North Carolina will record not only an employee's permanent address, but the mailing address (if different from the permanent address) and emergency contact information as well. Therefore, the Addresses infotype (0006) contains subtypes (1, 4, 5) for those additional addresses. Not all of the infotypes require subtypes.

Dates are Critical in BEACON SAP

BEACON North Carolina Office of the State Controller

- Every entry must have a beginning (effective) date
- BEACON SAP automatically assigns an end date
- Infotypes can be manually assigned an end date

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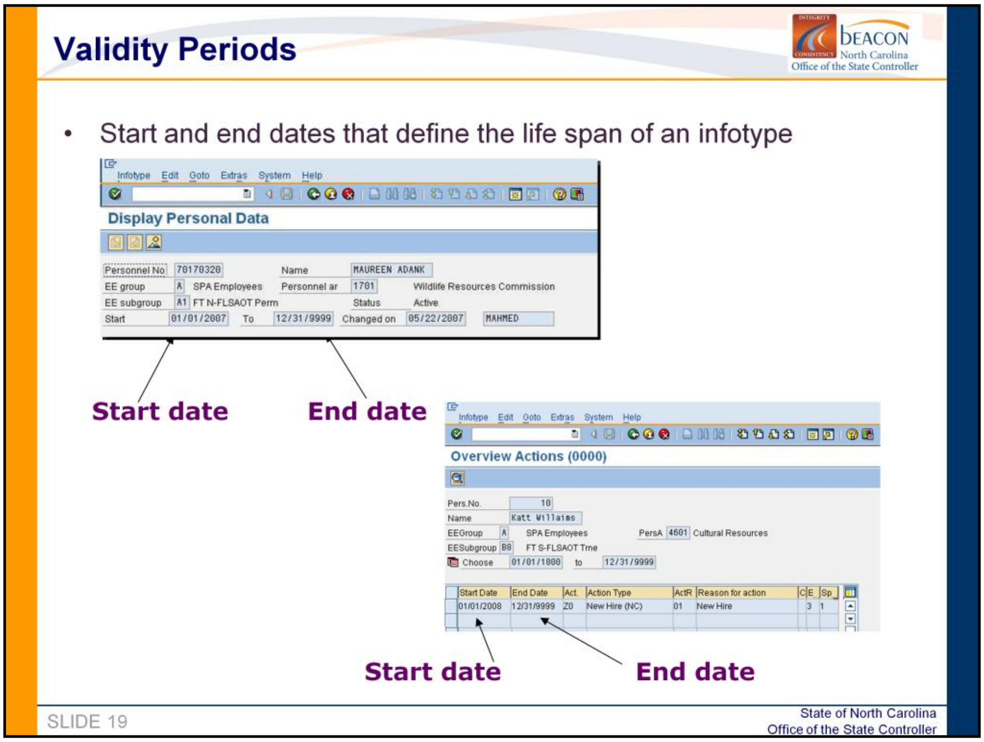
Notes

Every HR Action and infotype must have a beginning (effective) and ending date. When records are created or revised you are required to enter an effective (beginning) date. The BEACON SAP effective date default is the current date. Therefore, when you are entering data you must be especially diligent about entering the correct effective date.

BEACON SAP automatically assigns an end date of 12/31/9999 to the new or revised data. In addition, BEACON SAP assigns an end date to the previous data (if applicable) for an Action or infotype. An end date can also be manually entered by data entry personnel.

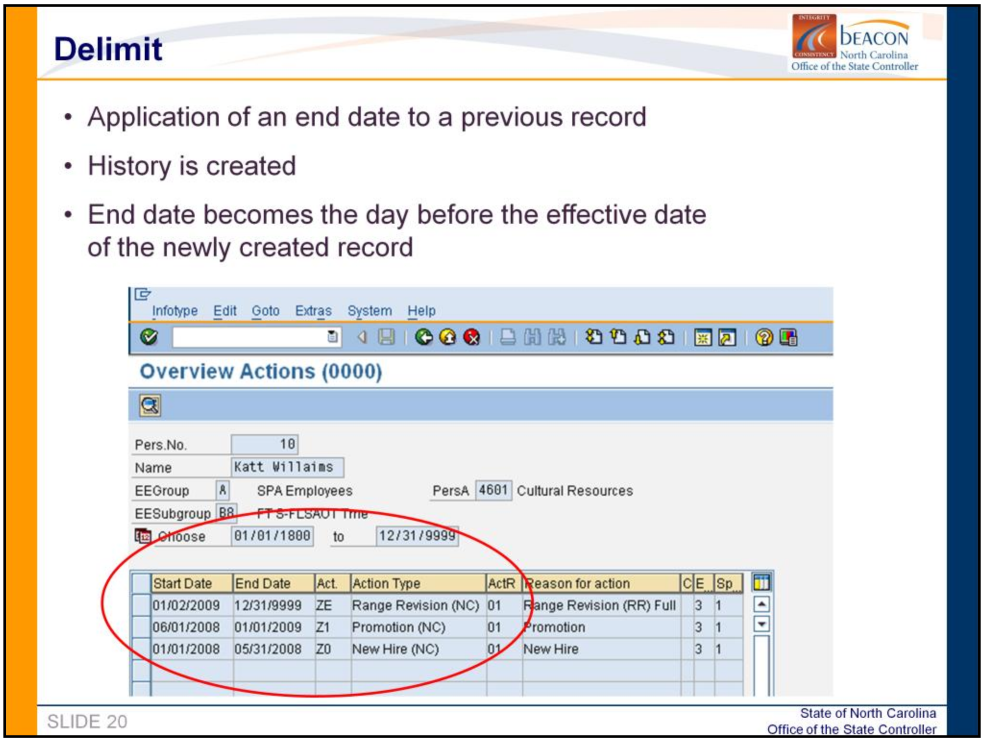


Notes

The time span between the effective (start) date and an ending (to) date is called the **validity period**. Although you will always know the start date of a record, you usually won't know the end date. For example, if an employee is hired or promoted today the end date for either of those records is unknown. To accommodate for that uncertainty, BEACON SAP allocates an end date of December 31, 9999 (sometimes referred to as the end of time) for all current records. When that current record ends, BEACON SAP applies the appropriate end date.

When an entry in an employee's BEACON SAP personnel record is revised the old record is not lost or overwritten (unless it is a correction entry). It just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you obviously don't need a historical record of the incorrect data.

When you use the overview function to view an employee's infotypes in BEACON SAP, some infotypes sort by date while others sort by other information and then date. When the infotype sorts by date, the most current record is always at the top of the list, with an end date of 12/31/9999. In PMIS, the current record was at the bottom of the list.



Notes

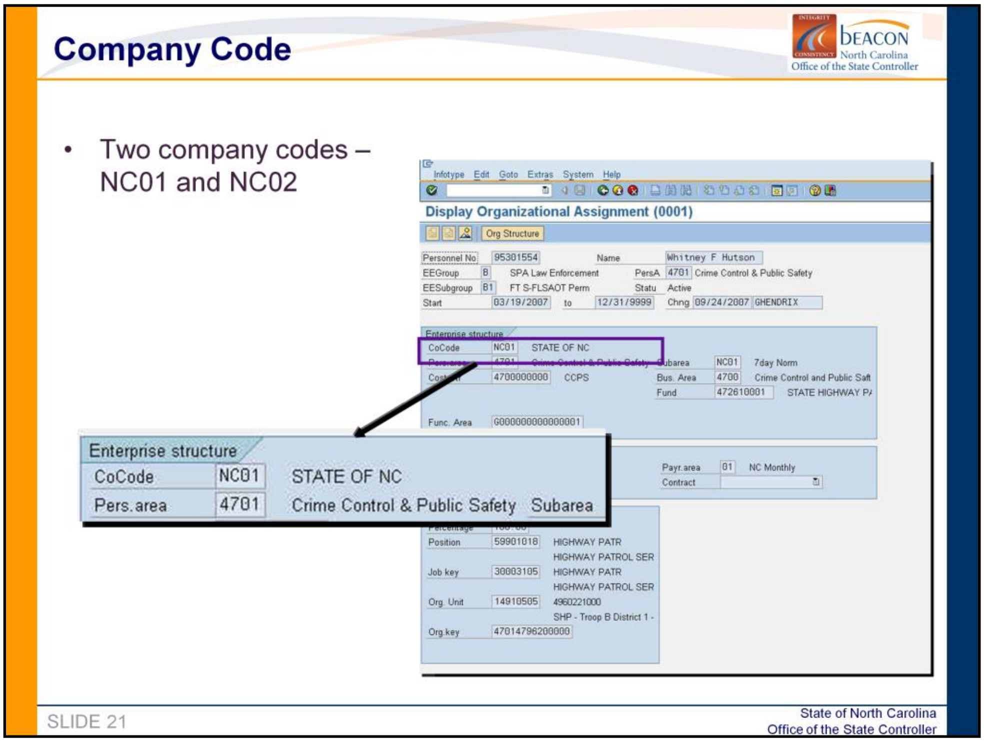
Delimit means to put an end date on a previous record. When the new record for an infotype is created, BEACON SAP automatically delimits the previous record to one day prior to the new record's effective date. This preserves history. Any record with an end date other than 12/31/9999 has been delimited.

In the example illustrated above the employee's original Action was the New Hire and when it was entered, it had an end date of 12/31/9999.

On 6/1/2008, an entry was made to promote the employee. When the effective date of 6/1/2008 was entered, SAP automatically delimited the new hire record to 5/31/2008 and applied 12/31/9999 to the promotion.

In a similar manner, when a range revision was entered 1/2/2009, SAP delimited the promotion one day prior and made the range revision the most current record.

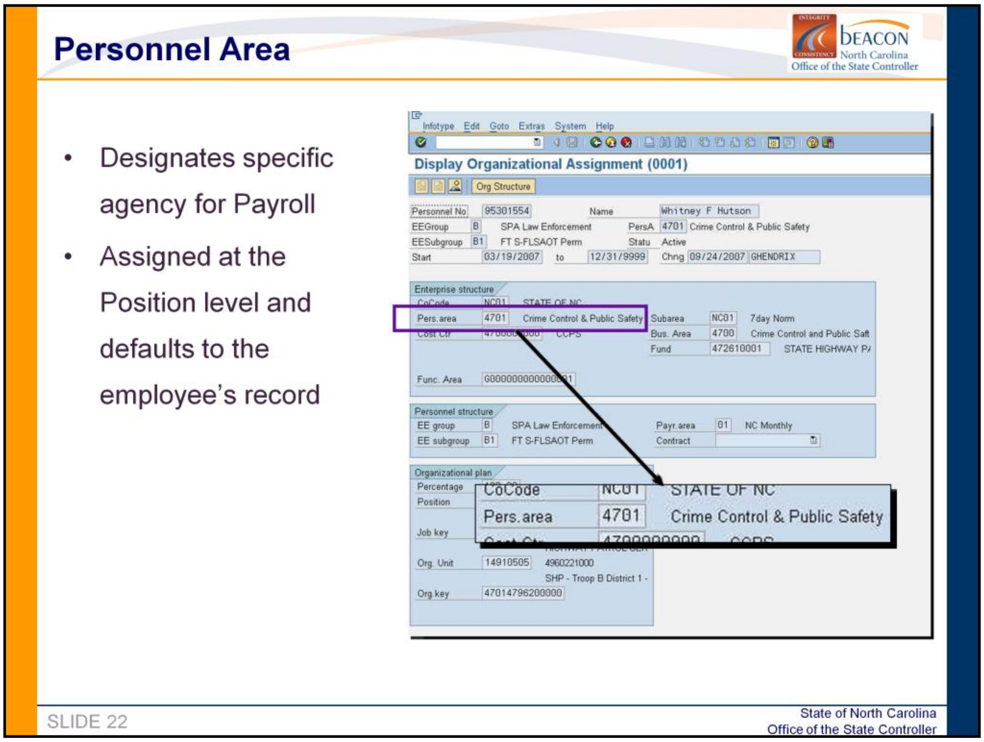
BEACON SAP is date driven so it is essential to understand the concept of validity periods and how BEACON preserves history.



Notes

A **Company Code** is an HR integration point with BEACON SAP financial accounting. The State of North Carolina will use two company codes: NC01 and NC02.

All agencies use NC01, with two exceptions. The two exceptions are the Department of Transportation (DOT) and the Employment Security Commission (ESC). These two agencies use NC02.



Notes

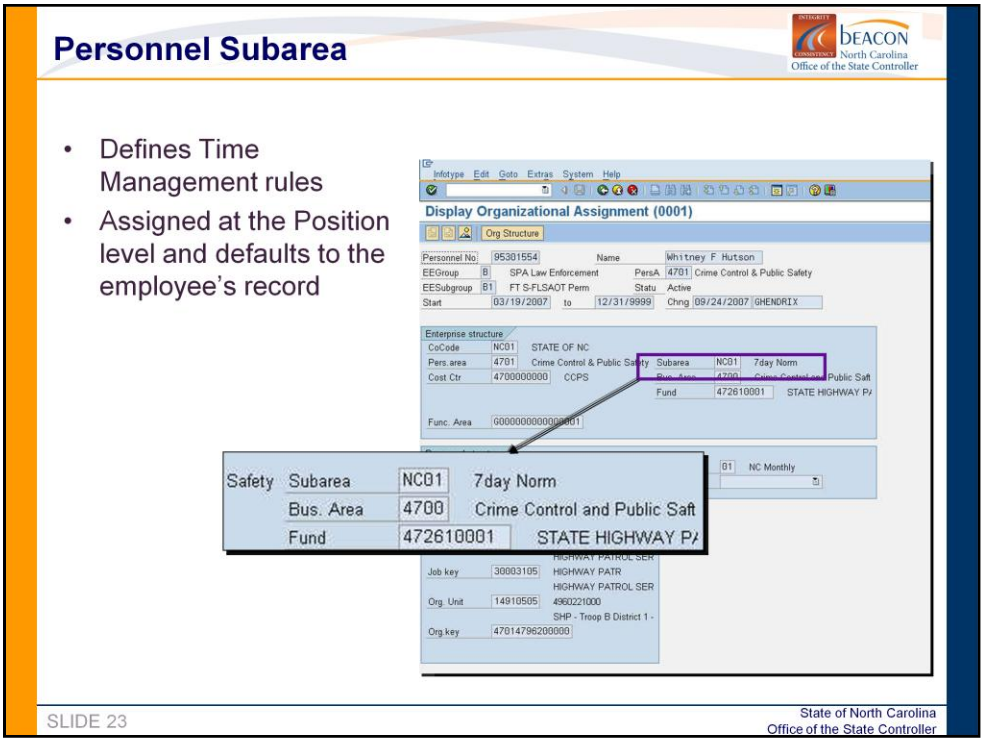
The **Personnel Area** is used by Payroll to identify the specific agency or department for whom the employee works. Personnel areas determine where wages and salaries are posted to and from where they are paid. The Personnel Area derives its 4-digit code from the Business Area field number, dropping the last digit and replacing it with a one. In the above example, the Personnel Area # 4701 is the same as the Business Area 4700 when you drop the last zero and replace it with a one. Some Personnel Area examples are:

Company Code NC01

- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02

- 1501 Transportation
- 4401 Employment Security Commission



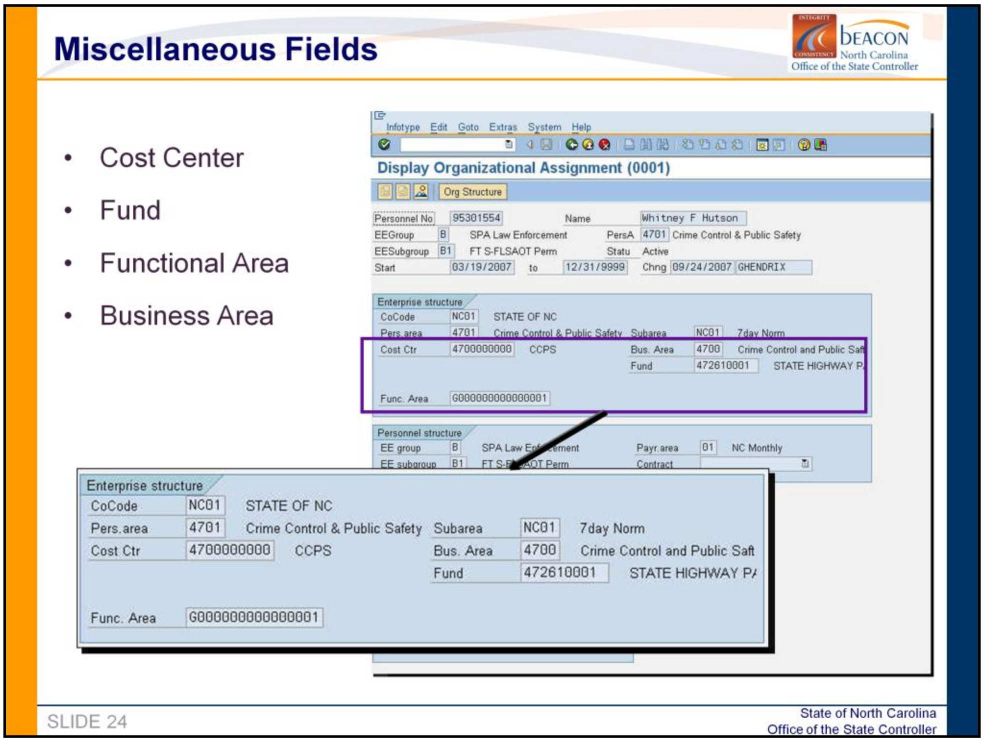
Notes

The **Personnel Subarea (PSA)** further defines the Personnel Area. PSA has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (i.e. 7-day schedule or 24/7).

PSA groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime Period)

Later in the lesson your instructor will show you how to display the online *Personnel Area and Subarea (PSA)* job aid. The job aid contains detailed information concerning the relevant Personnel Subarea associated with each Personnel Area.



Notes

The following fields are associated with the Finance module:

The **Cost Center** defaults from the Organizational Unit. There is only one Cost Center per Agency. This cost center is not the cost center associated with the funding for the Position.

The **Fund** defaults from the Organizational Unit. There is only one Fund per Agency. The Fund is not associated with the funding for the Position.

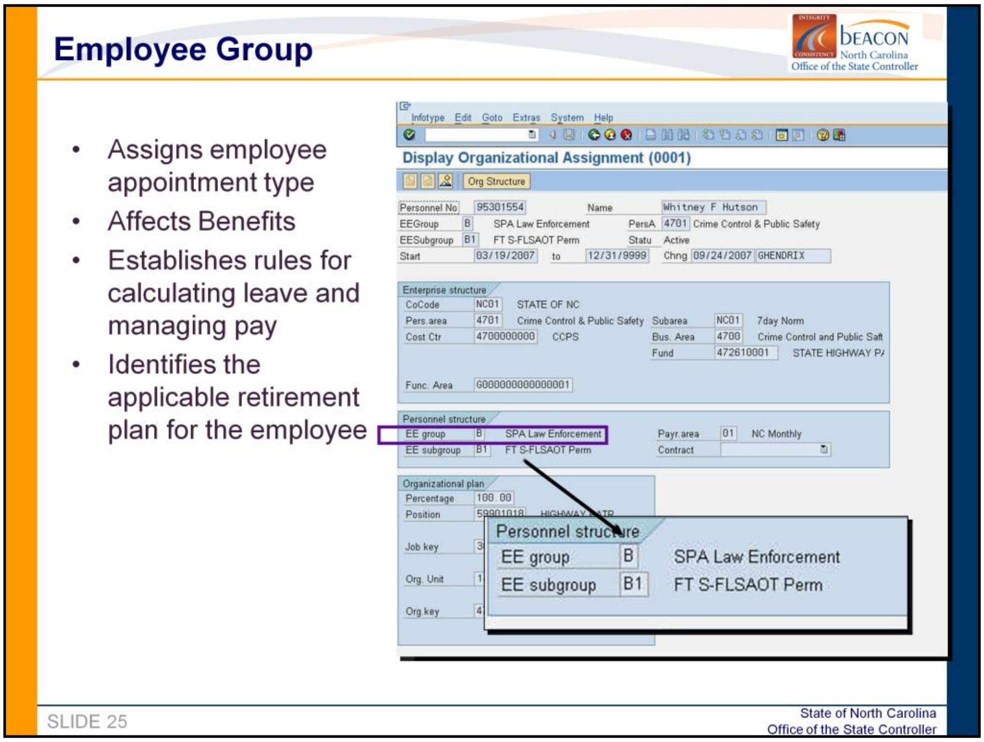
The **Functional Area** also defaults from the Organizational Unit. There is only one Functional Area for the State. The Functional Area is not associated with the funding for the Position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the old NCAS number.

In most cases, the Business Area represents an Agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)

The fields discussed above are populated and grayed out (and hence, cannot be changed) on the Personnel Administration screens.



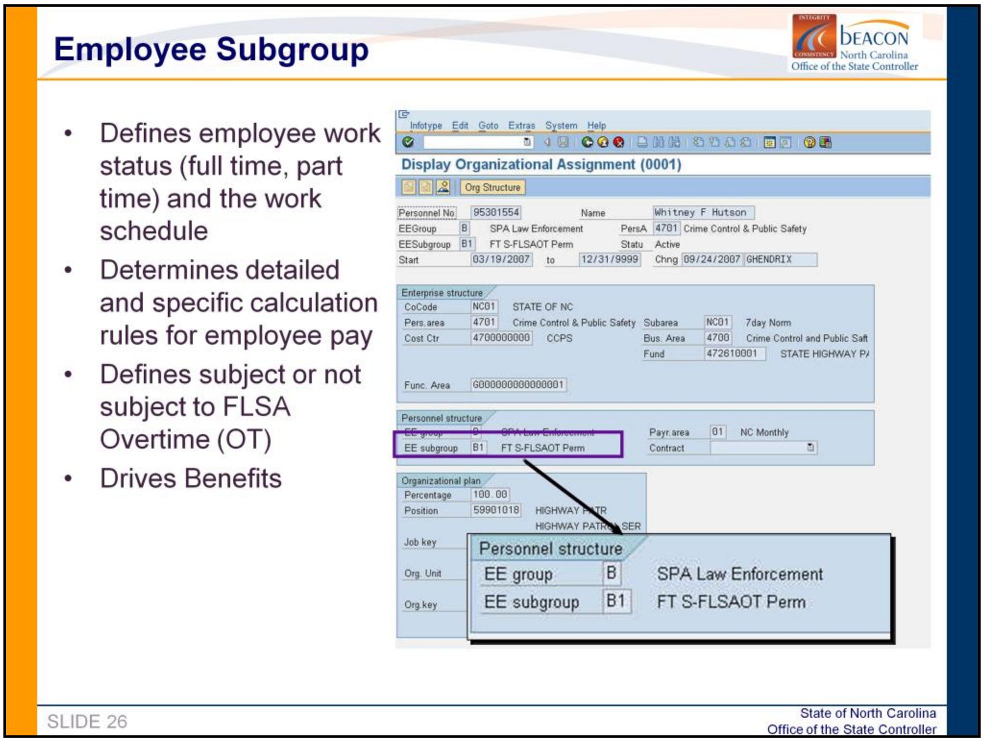
Notes

The **Employee Group** drives business rules for benefits eligibility determination as well as employee leave and pay calculations. In addition, the Employee Group identifies the retirement plan to which the employee is entitled.

The table below illustrates just a few examples of the State of North Carolina Employee Groups.

- A SPA Employees (Subject to Personnel Act employees)
- K EPA Employees (Exempt from Personnel Act Employees)
- O Supplemental Staff (temporaries, pick up firefighter, National Guard, contractor, etc.)

Employee groups (and subgroups next page) were determined by a combination of PMIS records as well as through discussions with OSP, OSC, Agencies and BEACON staff. The Employee Groups and Subgroups were created primarily for grouping employees according to specific Time, Payroll, and Benefits rules and are also required for HR reporting purposes.



The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, as well as full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. A few examples are:

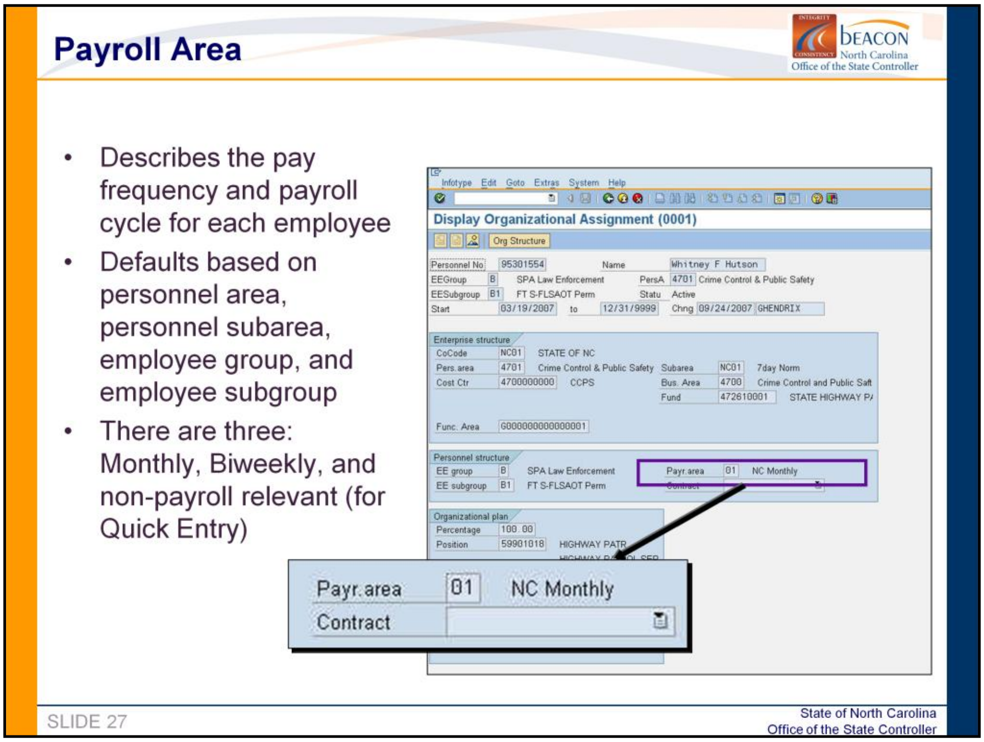
- A1 **FT N-FLSAOT** Perm [Full Time Not-(subject to) FLSA Overtime – Permanent]
- B1 **FT S-FLSAOT** Perm [Full time Subject (to) – FLSA Overtime – Permanent]
- Y8 **PT S-FLSAOT** Trne [Part-time Subject (to)-FLSA Overtime –Trainee]

The employee groups and subgroups are the same as the appointment types and FLSA indicators in PMIS. However, there are many combinations of Employee Groups and Subgroups in BEACON SAP.

URGENT! If the incorrect Employee Group and Subgroup are entered it impacts time, work against, dual employment, benefits, and pay. As discussed in *PA200*, accuracy is critical when you are entering data.

Later in the lesson, the instructor will show you how to display the *Employee Groups and Subgroups* online Job Aid. The job aid contains details about the various group and subgroup combinations.

Notes

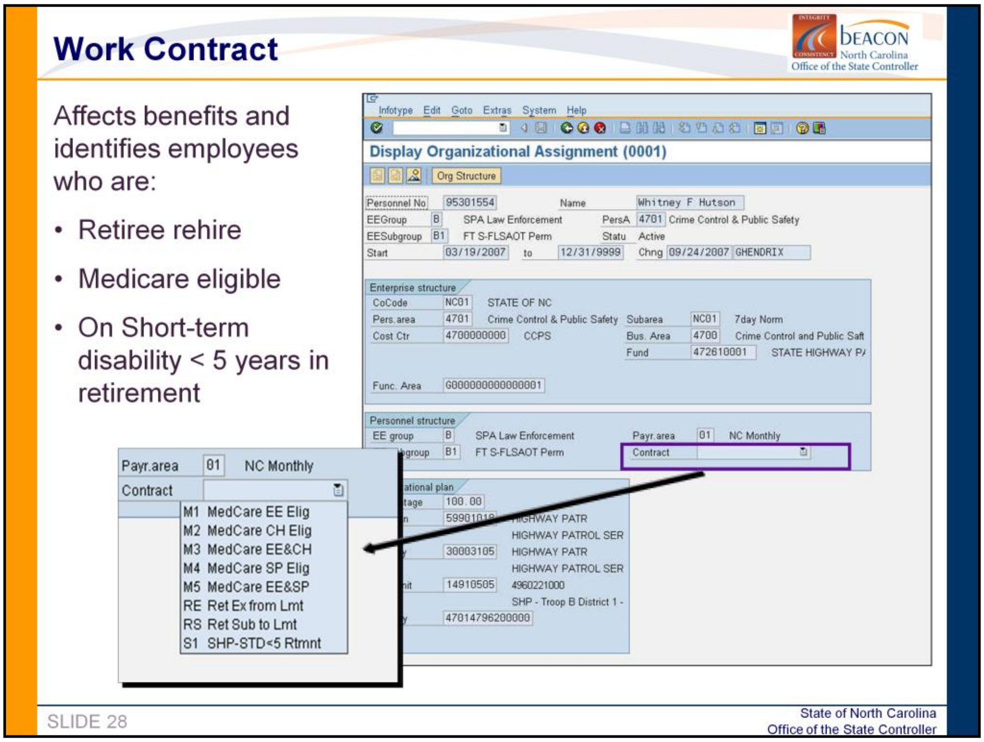


Notes

The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group, and employee subgroup. The payroll area determines the payroll cycle.

There are three Payroll Areas:

- 01 Monthly
- 04 Bi-weekly
- 99 Non-paying (for Quick Entry)



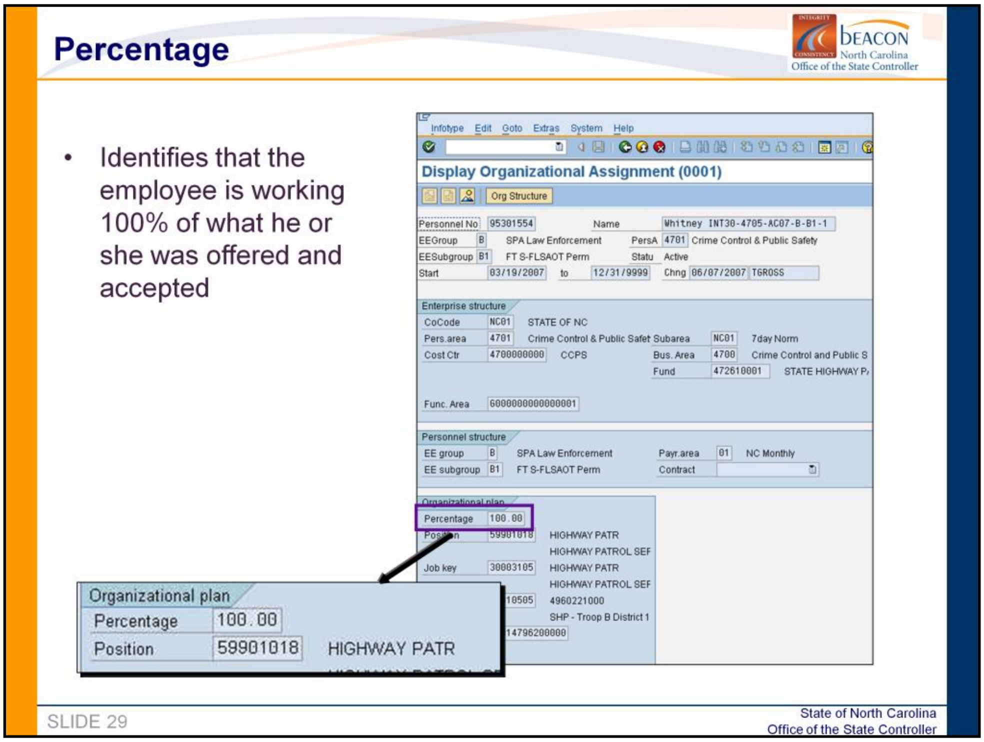
Notes

Benefits adjustments are made as applicable when the Contract field is populated. The Contract field is used to identify employees who meet the following criteria:

- Medicare eligibility – the employee pays an adjusted deduction for the State Health Plan (SHP) because Medicare rates are applied.
- Retiree rehire – a indication of whether the retiree has earning limitations or no limitations.
- Short-term Disability (STD) – used to change the State Health Plan deduction to full employee cost when an employee is out on Short-term Disability leave and has fewer than 5 years of service in the Retirement system.

Medicare eligibility and STD enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

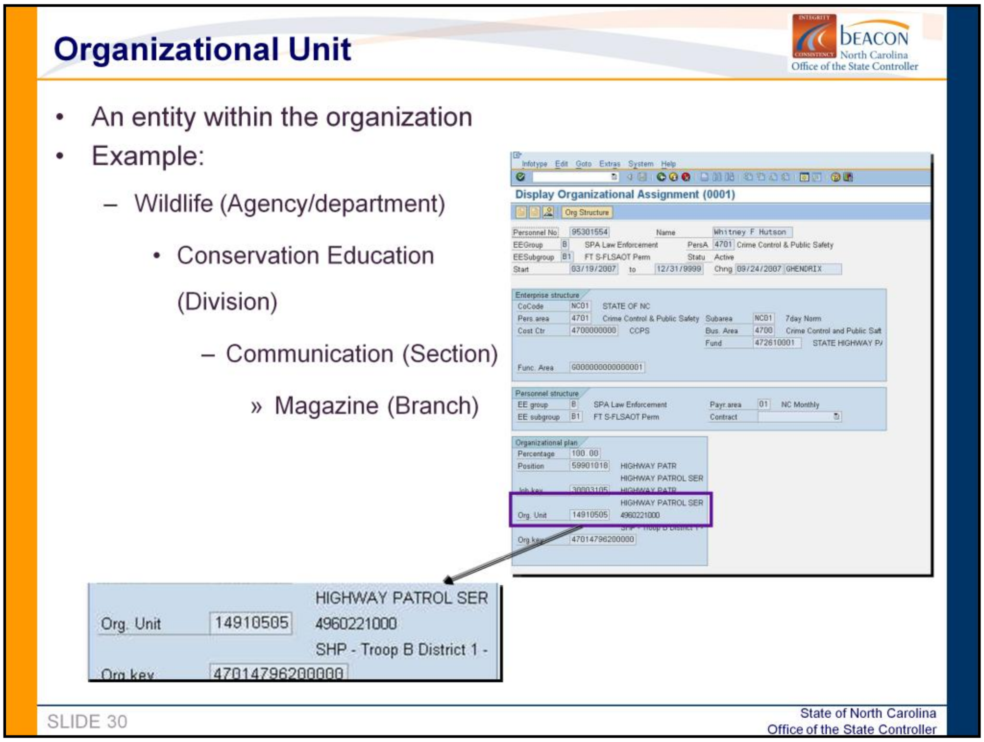
Retiree rehire earning limitations are used to report to ORBIT employees who are subject to earning limitations.



Notes

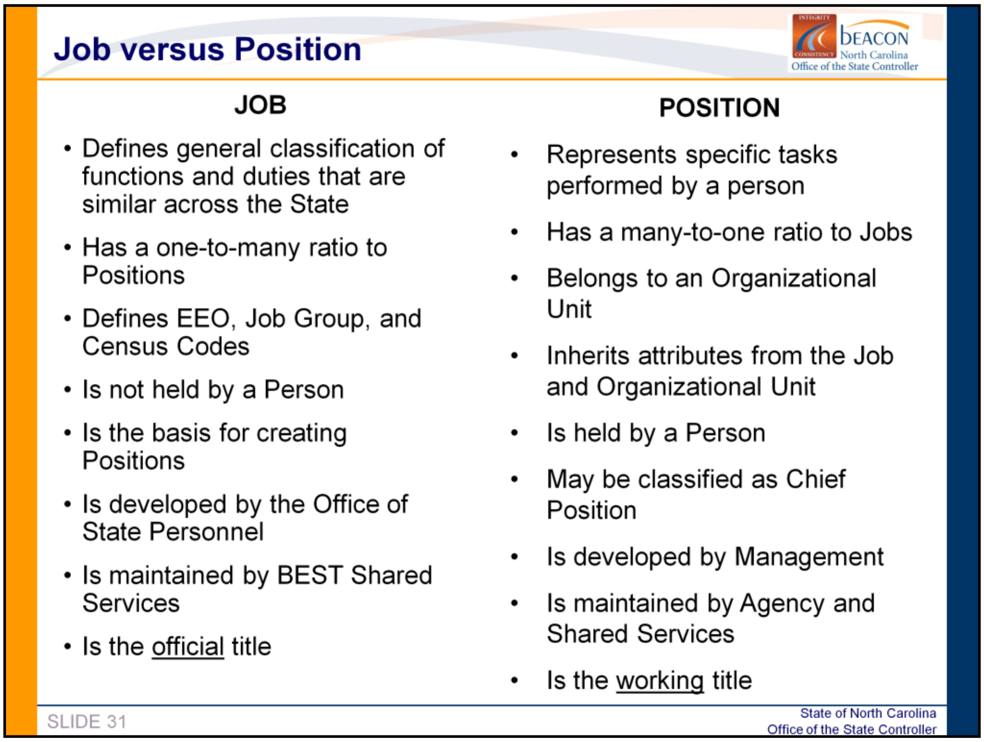
The **Percentage** will always be 100%. The State is not using the functionality of this percentage field, but is instead using the employee Weekly Working Hours. However, this is a required field in SAP and could not be eliminated from the screen. For the State of North Carolina, the percentage will always be set to 100%.

For example, if an employee accepted a full-time position at $48,000, that employee's percentage would be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at $20,000, each employee's percentage would also be 100%. This is because each employee is working 100% of what was offered and accepted, which would be a 20-hour work week at $20k.



Notes

An **Organizational Unit** (org unit) is a part of the organizational structure for the State of North Carolina. Some examples of an org unit include the Agency, Department, Division, Section or Branch.



Notes

A **Job** is the foundation from which Positions are created. A Job is a general classification of duties and attributes. Typical attributes are: function, job family, FLSA status and role. One Job can be used to create many Positions. A Job is identified by a unique number which is different from the old schematic code. The Job number has no built-in intelligence. In BEACON SAP, you will search for Job by job title. When you hear the term class or classification you will immediately know that a Job is being referenced. Of course, the converse is also true—when you hear Job, you will know it is a class. The Job title is the official title.

A **Position** inherits the general classification of duties and attributes from the Job. However, additional specific tasks and duties are added to the Position. Many Positions can be created from only one Job. Each Position has its own unique number as an identifier. The Position title is the working title.

In BEACON SAP, you can see both the Job (class) and the Position title for an employee.

Job versus Position Example

Official Job (Class) Title	Position (Working) Title
• Engineer (graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
• Forestry Technician (career banded, skill based)	• County Ranger • Nursery Technician • District Ranger

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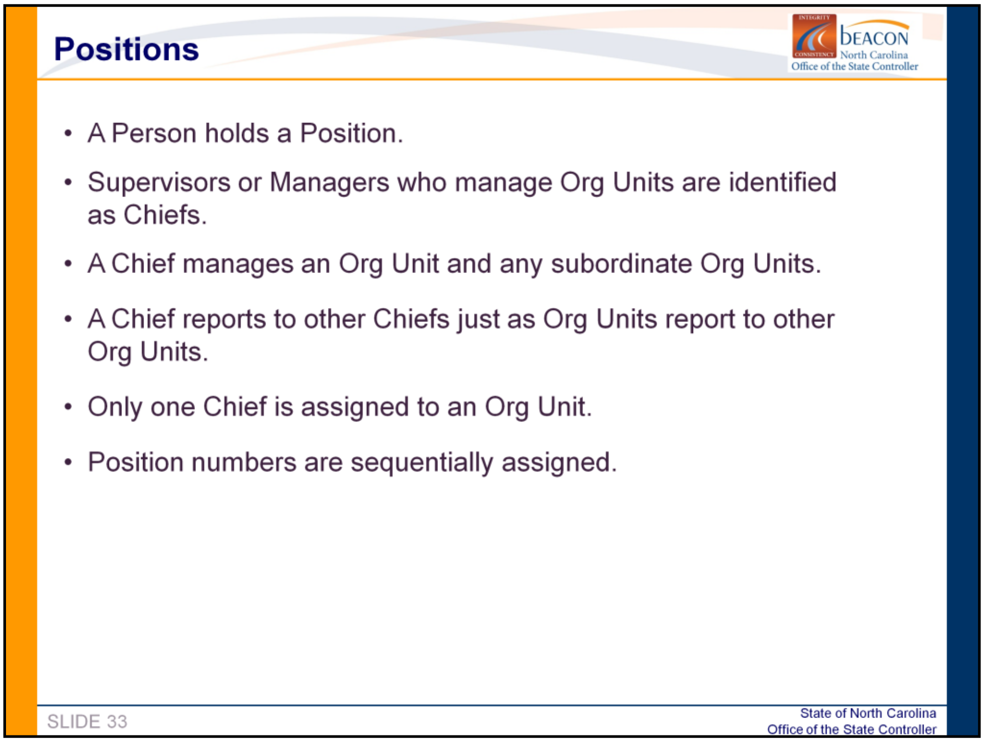
Notes

An example of a Job (class) and its related Positions is Engineering. There may be several different types of engineers in the organization. Each Engineer Position has its own specific tasks and duties; however, some general information is common to all Engineer Positions. That general information is created in the Job and then used as a template to create the various Engineer Positions. The specific information pertinent to each Engineer Position is then added at the Position level.

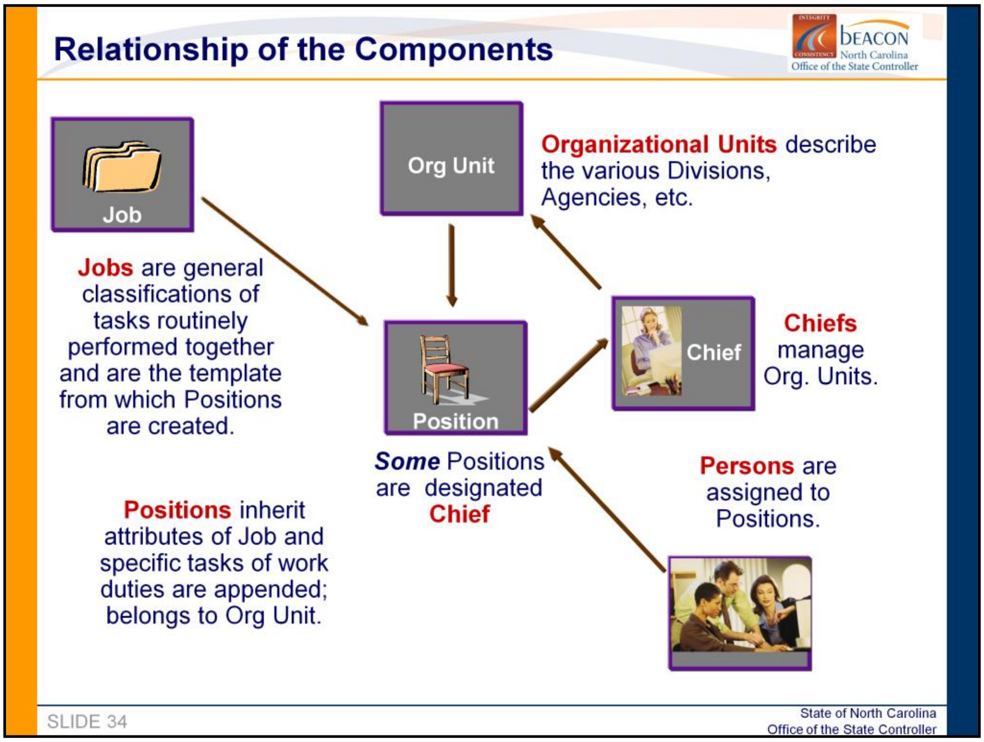
The relationship between Jobs and Positions is the same in both graded and banded Jobs and Positions.



Notes

A Position is described by a Job and held by a **person**. In BEACON SAP terms, a person is a holder of a Position, and is not a holder of a Job. When a person is hired using the PA modules, he or she is assigned to a Position that resides in an Organizational Unit. It is important to remember that an employee's personnel record will contain the Position name and number, Org Unit name and number, and Job name and number as well as the person's name and personnel number. In BEACON SAP, Position numbers are assigned sequentially. There is no set numbering convention nor intelligence to the number.

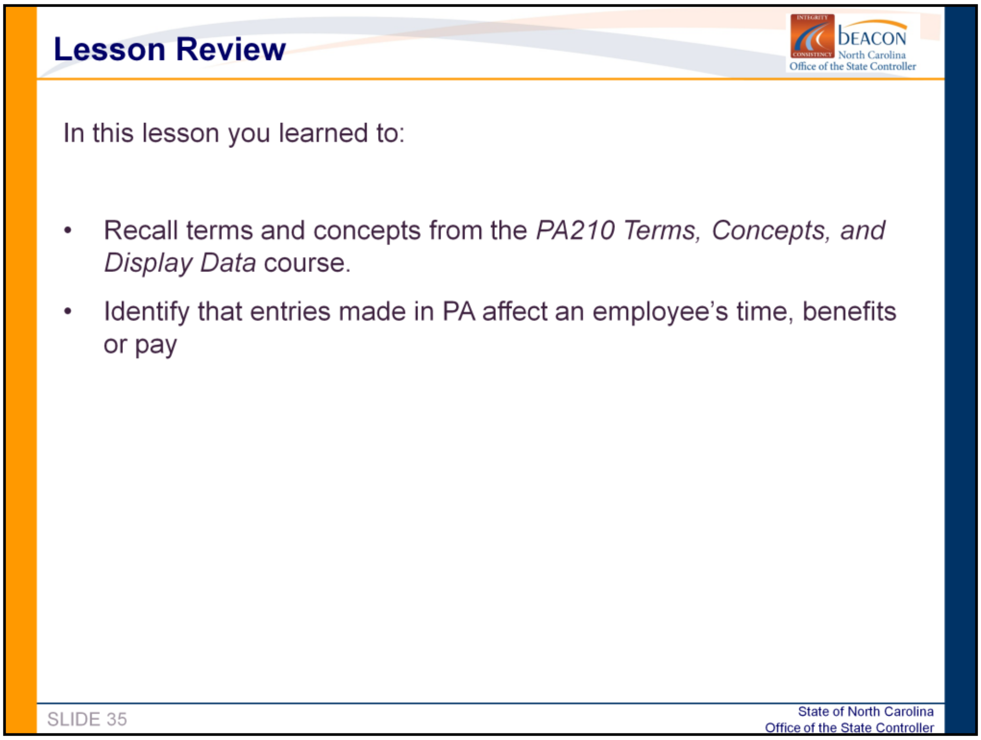
Some Positions are designated as Chief Positions. Any Position that manages an Organizational Unit will be designated a Chief Position. When you think of a traditional organizational chart, you know that managers usually report to an upper level manager, and the division, agency or department reports up the organization as well. The same is true for the Chief Position and the Organizational Unit that he or she manages.



Notes

As illustrated, the Org Unit, Job, Position, and Persons are related. After the Org Unit is created, a Position is created from a Job and assigned to the Org Unit. The Position may be classified as a Chief Position if it manages an Org Unit. Persons are assigned to the various Positions.

Org units, Jobs, and Positions are maintained in the Organizational Management modules which are not part of Personnel Administration. However, it is necessary that you have a general understanding of how the components are related.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Recall terms and concepts from the PA210 Terms, Concepts, and Display Data course.
• Identify that entries made in PA affect an employee's time, benefits or pay
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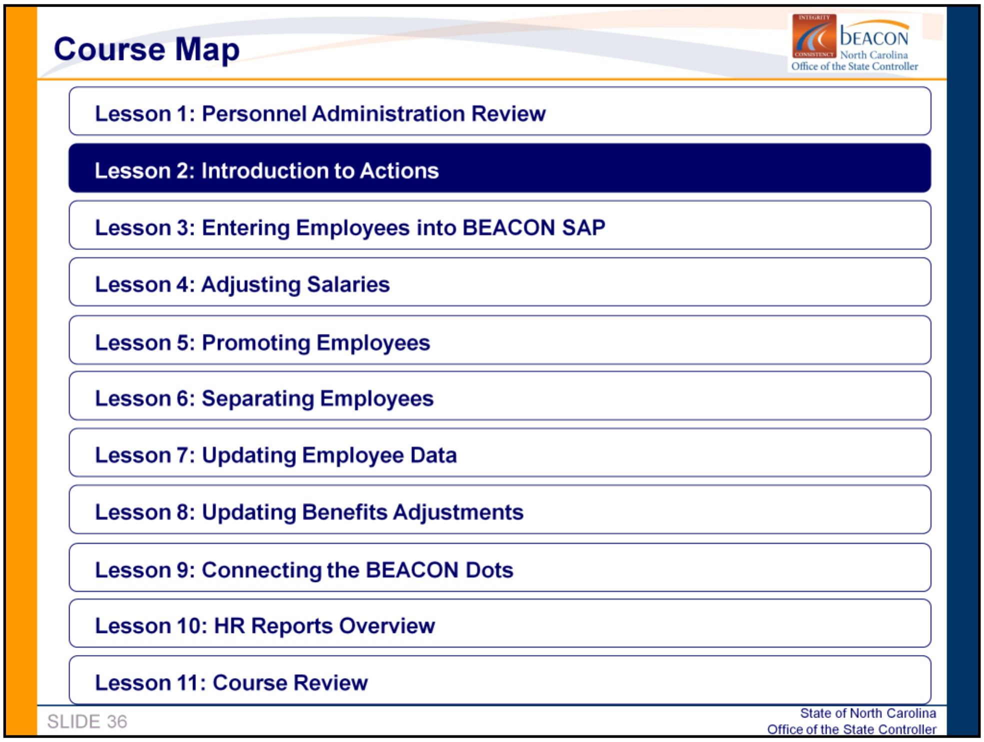
Notes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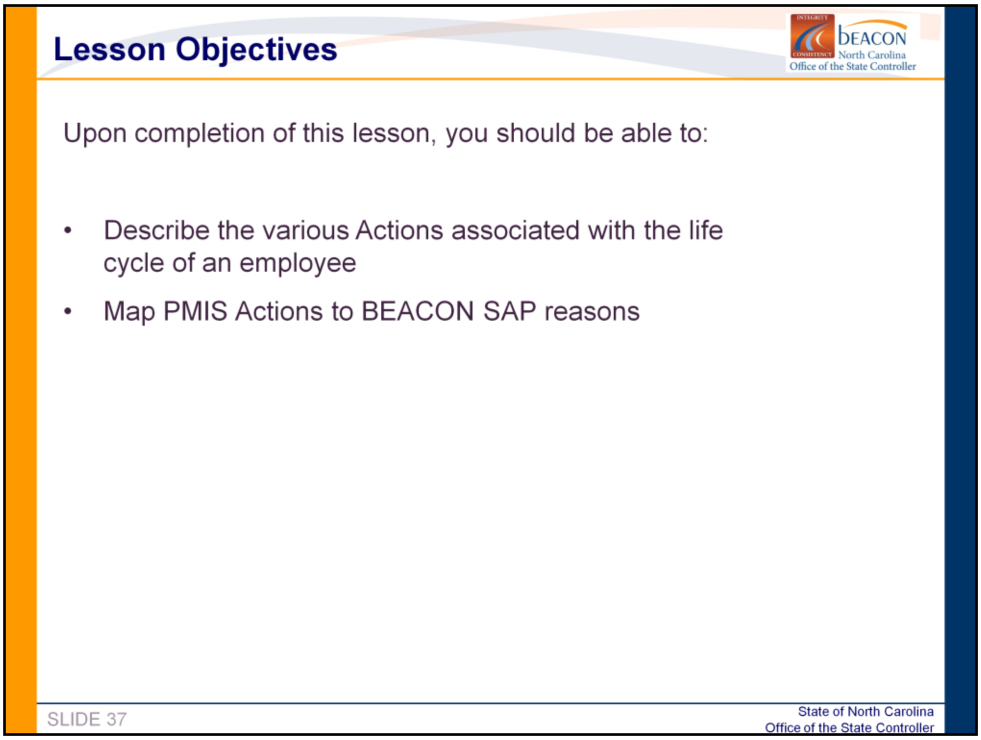
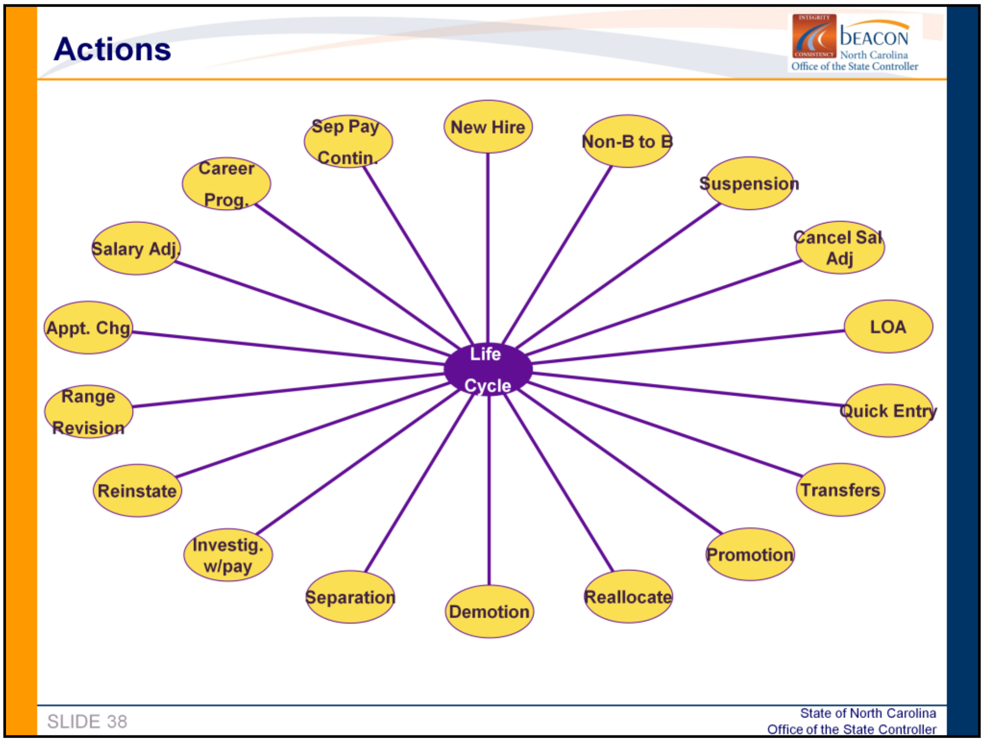
Notes


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Describe the various Actions associated with the life cycle of an employee
• Map PMIS Actions to BEACON SAP reasons
SLIDE 37
State of North Carolina
Office of the State Controller

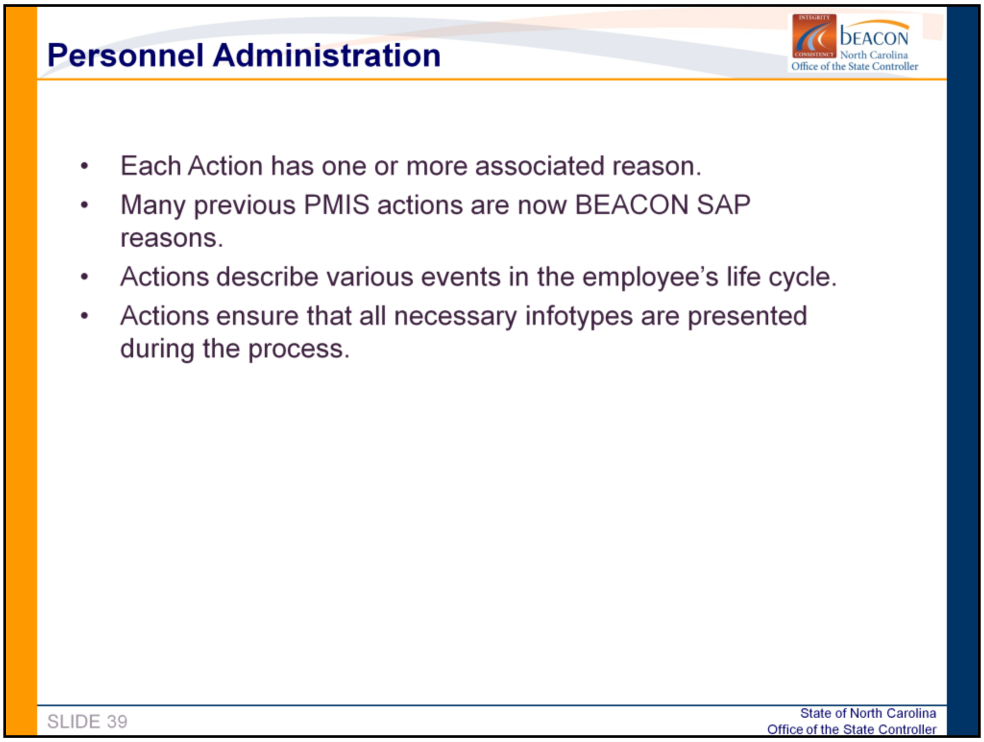
Notes



Notes

As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. BEACON SAP defines those events as a specific infotype called **Actions** (0000). Actions for the State of North Carolina are shown above. New Actions that were not part of the PMIS system include: Investigatory, Separation Pay Continuation, Quick Entry, and LOA (Leave of Absence). Observe there is no longer a separate LWOP Action. LOA replaces LWOP.

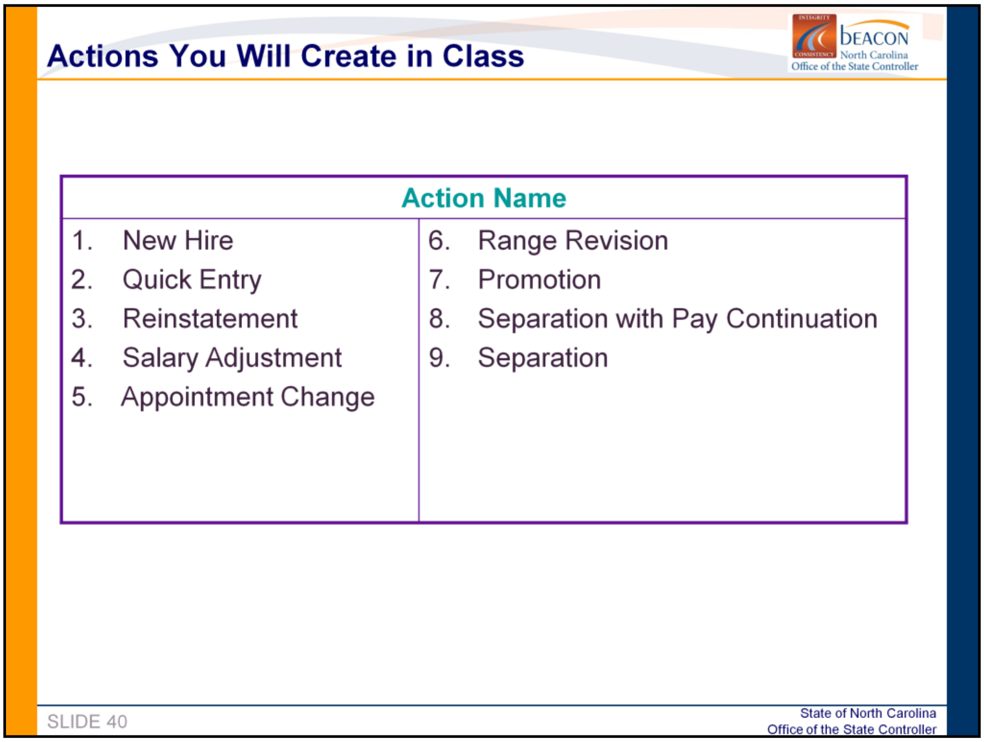
An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You don't have to remember whether a particular infotype should be included—BEACON SAP automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.



Notes

Each Action has one or more reasons that are associated with the life cycle event. When you create an Action in BEACON SAP you determine and select the appropriate reason for the employee's life cycle event. Some of the actions that you previously used in PMIS are now the reasons in BEACON SAP.

With the Actions infotype (0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages an employee passes through in his or her history with the State. Only the current data was downloaded into BEACON.

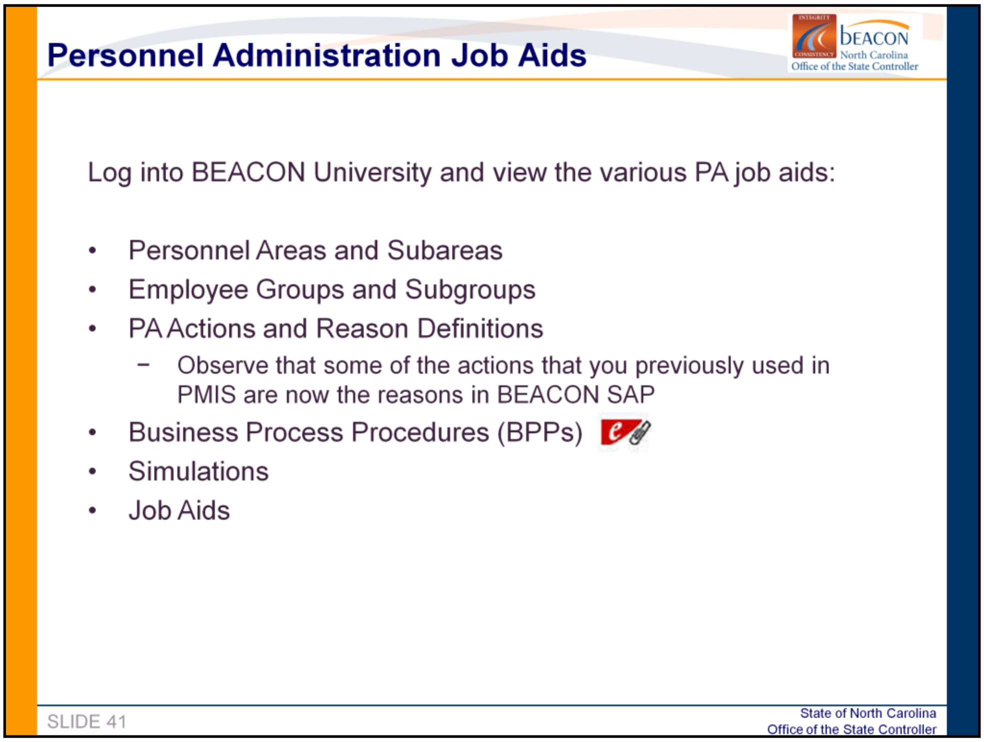


Notes

The State of North Carolina has a variety of Actions that you will use. However, in this course, you will only create a selected few, as listed above. This course is designed to give you the opportunity to learn three basic functions: getting an employee into the system, making salary adjustments based on work events, and separating the employee. The remaining Actions (leaves, transfers, dual employment, and work against), are more complex and will be covered in a subsequent class, *PA410 Advanced Create and Maintain Employee Data.*

The demonstrations and exercises that are presented hereafter assume that all necessary policies and procedures have been followed, and appropriate forms, etc. have been submitted and approved. **All of the approvals and processes that you had to do prior to BEACON SAP are still the same**.

In addition, the necessity of keeping appropriate hard copies of personnel records (applications, reviews, etc.) remains. These documents should still be saved and stored as they were prior to BEACON.

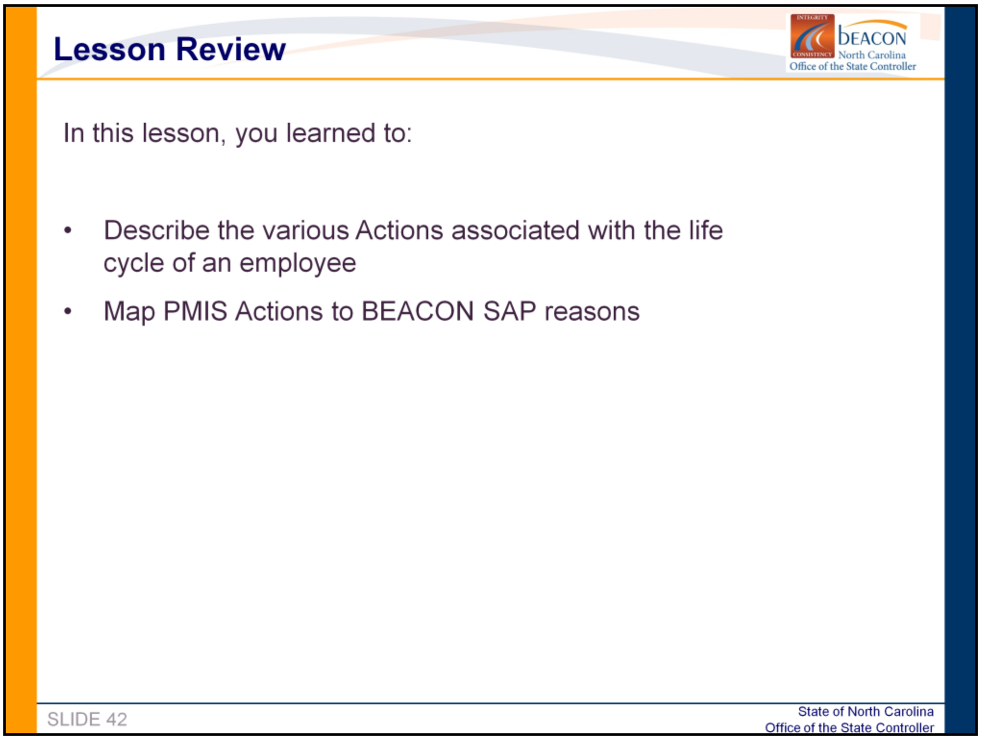


Notes

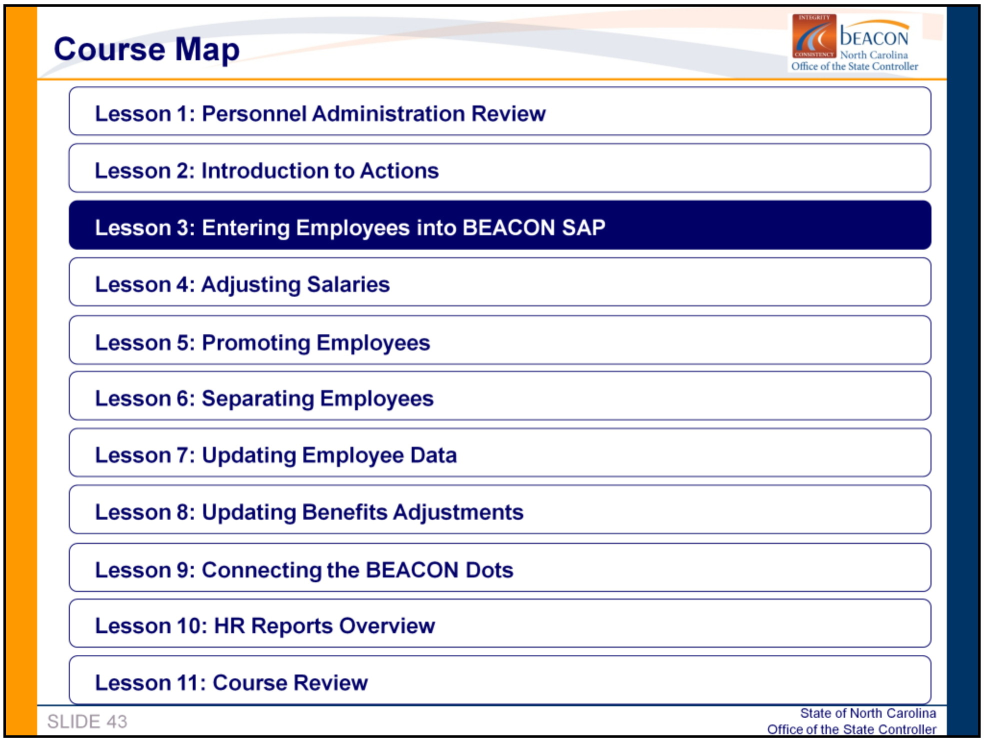
The instructor will show you how to display various online job aids located in BEACON University.

eAssistant

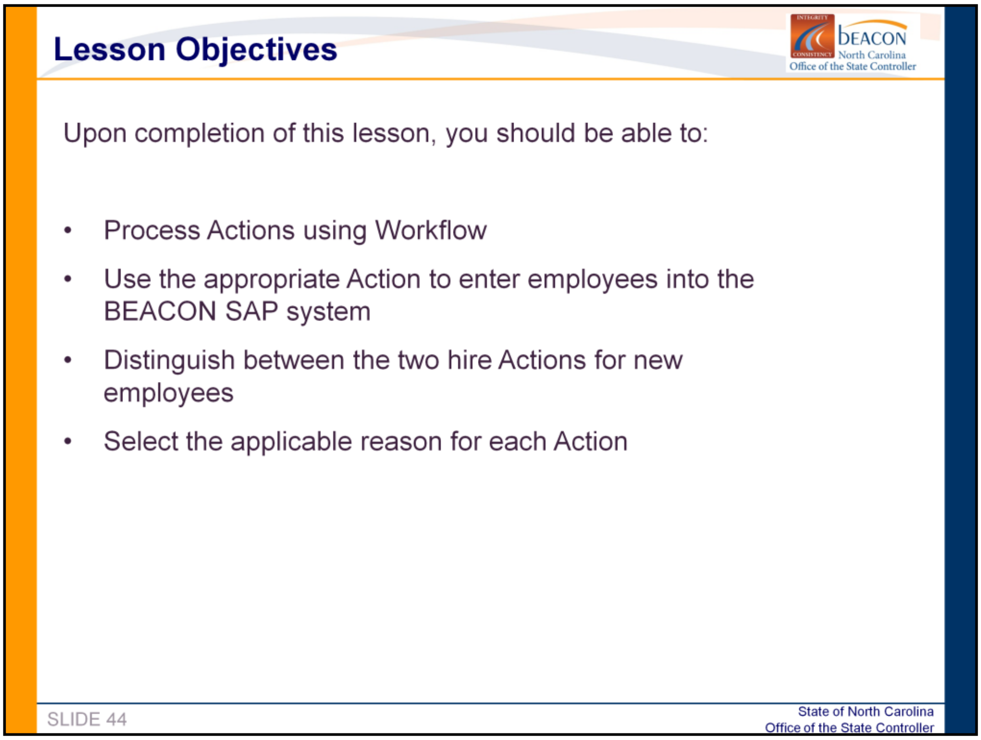
This tool provides step-by-step instructions for each SAP transaction. You can access eAssistant from any BEACON SAP screen. Just click **Help** on the menu bar and then select **BEACON Help**. A new window is displayed on top of the BEACON SAP. You can drag the sides of the screen to make it larger or smaller.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
• Describe the various Actions associated with the life cycle of an employee
• Map PMIS Actions to BEACON SAP reasons
SLIDE 42
State of North Carolina
Office of the State Controller

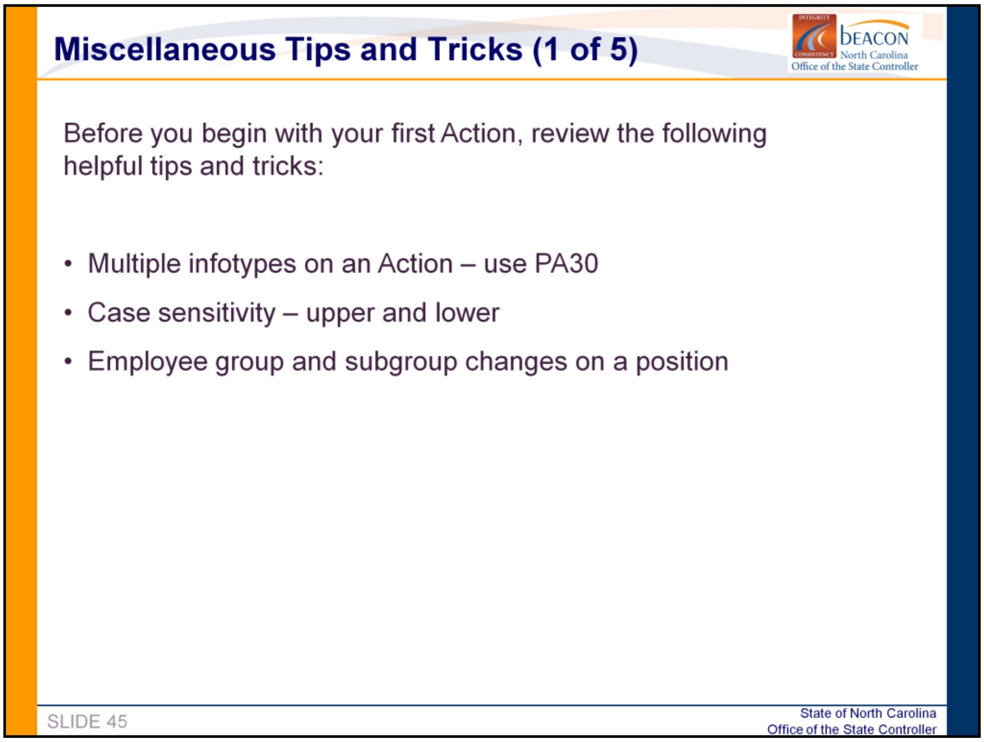
Notes


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Personnel Administration Review
Lesson 2: Introduction to Actions
Lesson 3: Entering Employees into BEACON SAP
Lesson 4: Adjusting Salaries
Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
SLIDE 43
State of North Carolina
Office of the State Controller

Notes


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Process Actions using Workflow
• Use the appropriate Action to enter employees into the BEACON SAP system
• Distinguish between the two hire Actions for new employees
• Select the applicable reason for each Action
SLIDE 44
State of North Carolina
Office of the State Controller

Notes



Notes

Multiple infotypes for a specific item

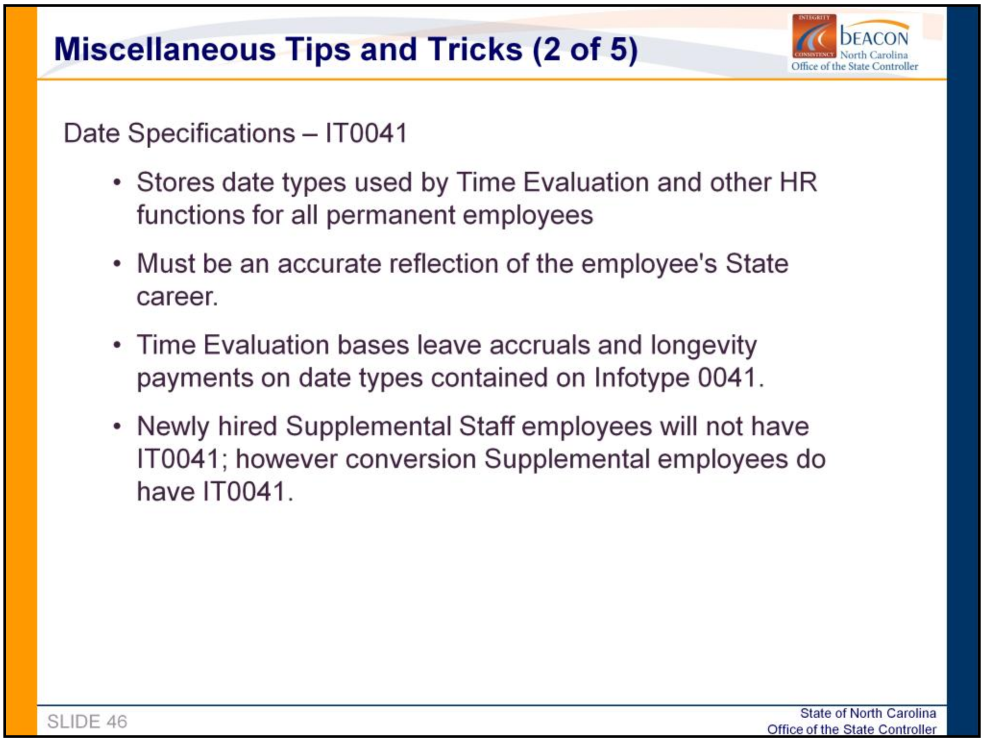
In most cases, each infotype is presented only one time in an Action. When an employee needs more than one infotype (bank details, objects-on-loan, certifications etc.), enter the applicable data during the Action and use transaction code PA30 to enter the additional data.

Case sensitivity

BEACON SAP is case sensitive. The standard for the State uses upper and lower case (sentence format). It is important to maintain this format for consistency in reports and searches. This is true for all entries, including Actions and PA30 transactions.

Employee Group and Subgroup changes on a Position

When a position has been revised by OM to change the employee group and subgroup, that change does not feed to PA until a new PA Action is created. To change the Employee Group and Subgroup of an employee, it is necessary to do an Appointment Change Action.



Notes

Date type 01 - Original Hire Date - the employee's first hire date; should remain the same throughout the employee's State career .

Date type 02 - Agency Hire Dare - initially set to the employee's hire date. This date type is automatically maintained when an employee is reinstated following a leave of absence or transfers from one State agency to another State agency.

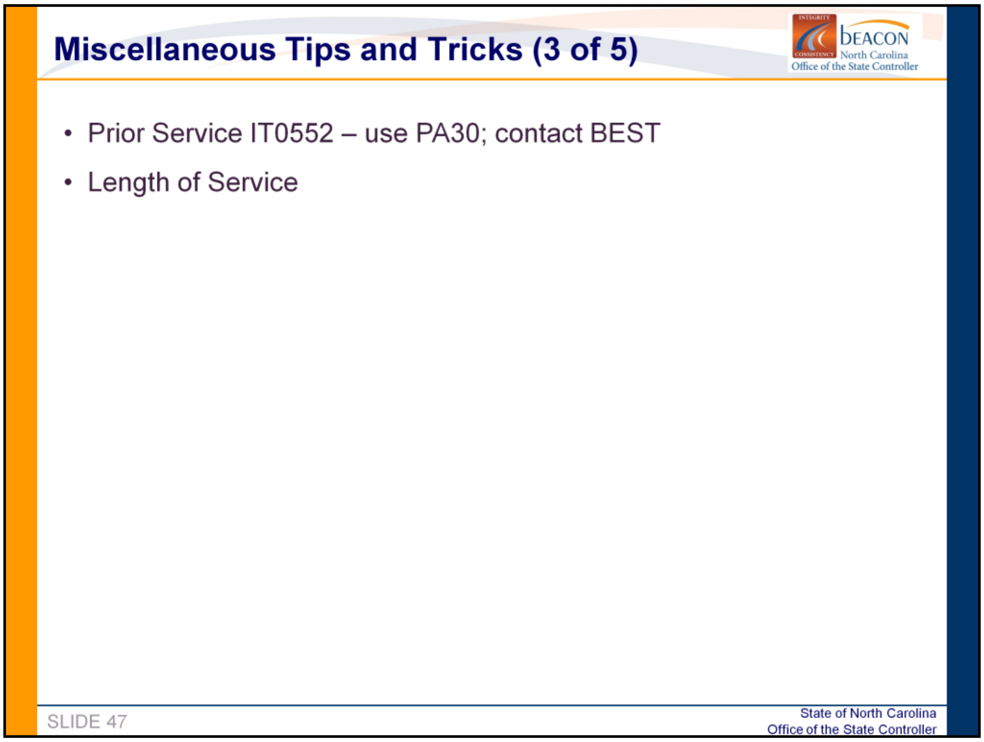
Date type 07 - Lottery Anniversary Date - the date an employee is hired into or transfers to NCEL.

Date type 04 - Judicial Anniversary Date – the date an employee is hired into or transfers to Judicial.

Date type 03 - Last Day Worked Date - the employee's final day of work prior to a separation from the State.

Date type NR - 457 Catch-Up Date - an employee's normal retirement date represents the date at which the employee will turn 65 and is thus eligible for additional contributions into his or her 457 Savings Plan. Day type NR will only be created if an employee is eligible and requests to make additional 457 contributions.

Date type 06 - Notification of RIF - the date an employee is officially notified his/her current position will no longer be available. This date also represents the beginning of the 12 month period of RIF eligibility and benefits.



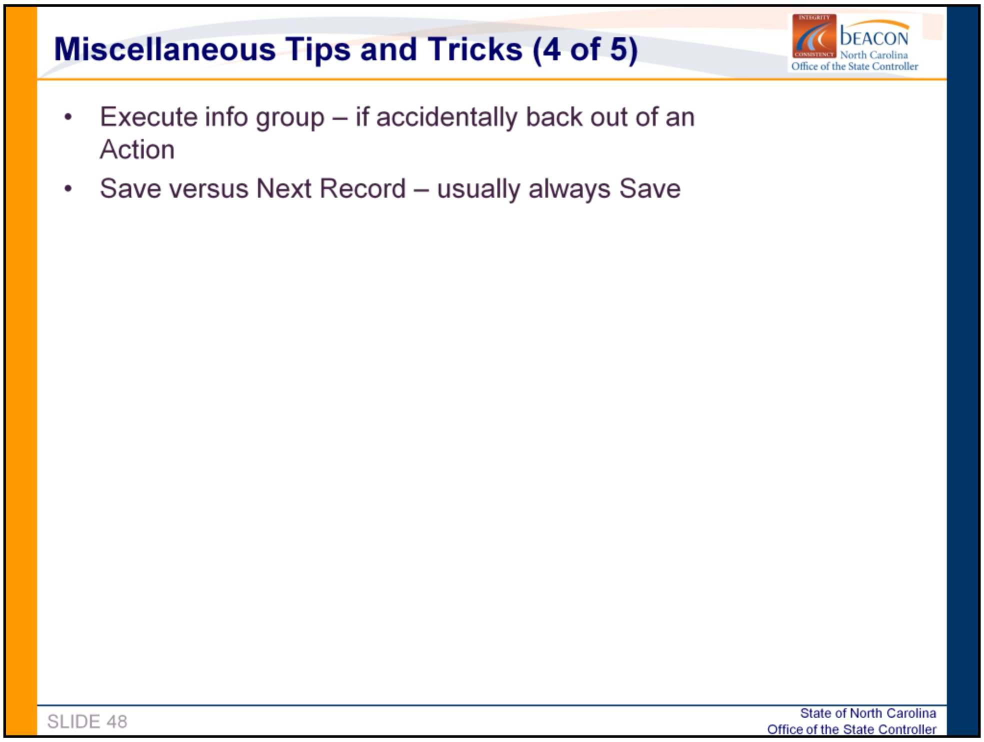
Notes

Prior service – IT0552 – Time Specifications/Employment Period

If you make an entry or change IT0552 (Time Specifications/Employment Period), you **must** contact BEST because they run a program in the background that ties all IT0552s together. Creditable service earned prior to BEACON must be entered on IT0552. Once an employee is entered into BEACON, the system automatically calculates creditable service and the longevity date through the Time module. IT0552 does not display in any PA Action; therefore, use PA30 to enter the creditable service dates (after you verify that the employee is entitled). IT0552 calculates the number of months of prior service based on the dates that were entered. If the months don't calculate correctly, you may have to adjust the dates accordingly just as you did in PMIS (this rarely happens). If you do have to adjust the dates, you should enter the correct work dates in the comments field. If the employee has prior service from more than one Agency, create a separate PA30 IT0552 for each service record. **Do not change the date on the original (conversion) IT0552 so that it calculates the total time**. For example, an employee has a BEACON record of 50 total service months with the State and leaves State employment to work for a local government agency from which the State accepts time worked. When the employee is re-instated, create a separate IT0552 for that service (rather than manipulating the end date on the original IT0552).

Length of Service

If you have the "Display Time" role, you can use PT_BAL00 to view the latest number of months of service. See the online job aid *Length of Service*, for details on accessing the transaction.



Execute info group button:

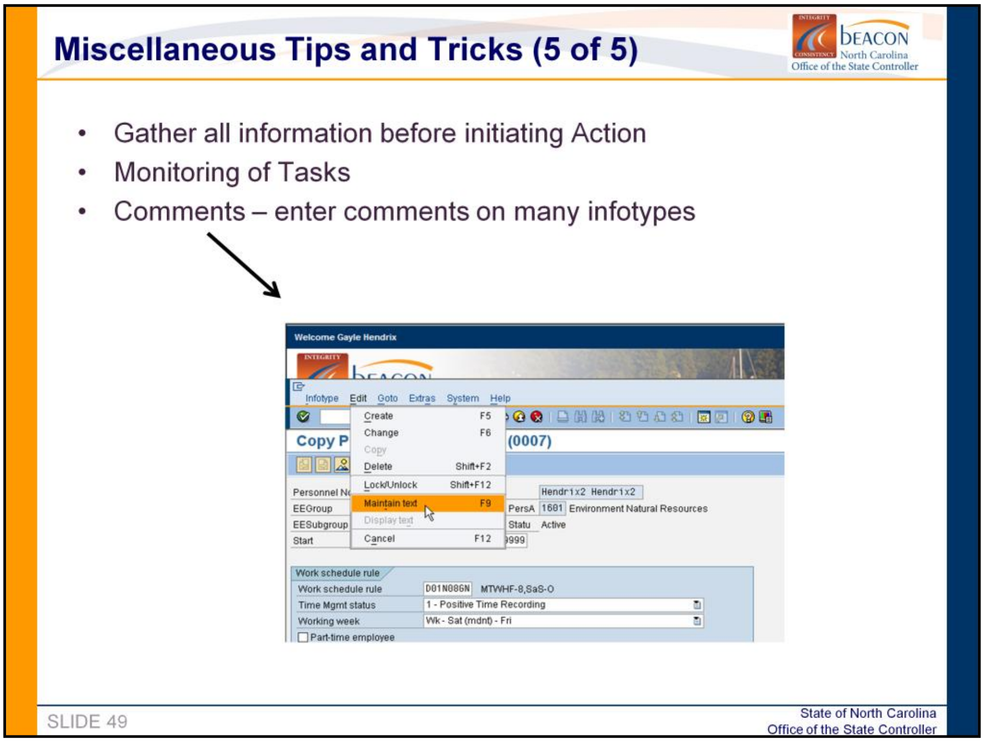
When you are entering data in an Action you may accidentally click the Back button. When this happens the system backs you out of the Action to the *Personnel Actions* screen. To return to the infotype you were previously on, select the same Action, date, and personnel number, and click Execute. On the next screen, select **Execute info group**. A warning message is displayed indicating that the personnel action is not saved. Click **Continue** and page forward until you get to the infotype you accidentally exited. You may notice that some infotypes did not retain the prior information you entered (like taxes and monitoring of tasks). Simply re-enter that data. Continue entering data on each infotype until the Action is complete. You **should not use PA30** and **individually complete** the infotypes because dynamic processes that are connected to payroll, time and benefits will fail to process (processing the Action causes the dynamic processes to occur).

Save versus Next Record

Even if you make no changes to an infotype, you should still **Save**. The infotype may be connected to dynamic infotypes which will not display if you have not saved.

The only time you would use the **Next record** button is when you do not need to enter data in the infotype. For example, if you do not need to enter data on the Monitoring of Tasks (0019) infotype, you would use the Next record button. If you used Save instead of Next record, you would receive an error message and not be able to move forward. The general rule is: **Save** infotypes that are pre-populated, <u>even</u> if you do not make any changes. If the infotype is blank and you are not entering data in any of the blank required fields, use **Next Record**.

Notes



Gather all data before initiating Action

Notes

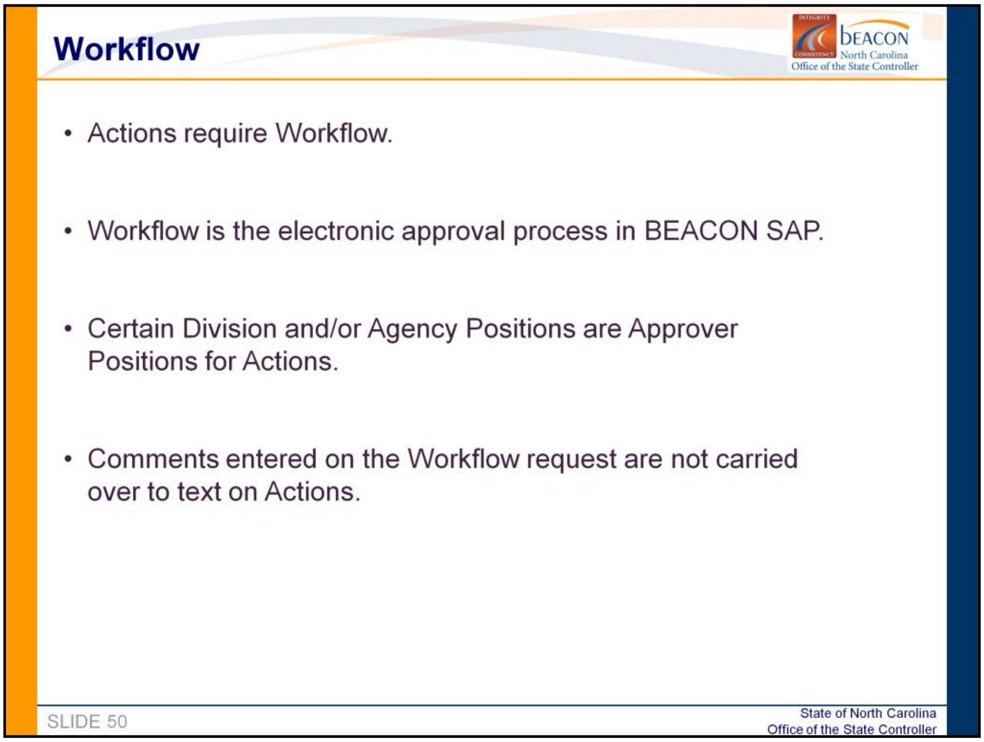
It is a best practice to gather all of the employee's information before initiating an Action—don't start the Action until you can finish it. There may be occasions, like a New Hire, when the information is not available (bank details, tax, etc.). In that case, after you get the approval via Workflow, let the PCR stay in the inbox until the employee arrives before you initiate the Action. If the employee is a no-show, you only have to cancel the PCR since the Action was not initiated. When you do initiate the Action, if the bank and tax information is still not available, set the Bank Details (IT0009) to check. See the note in Exercise 3.1 concerning Bank Details. Tax withholding automatically sets to single, zero allowances.

Monitoring of Tasks

This infotype is like a tickler file and is date driven. After you enter the due date, it reminds you to follow up on a task. Run the Date Monitoring report (S_PH0_48000450 in SAP or B0099 in BI) to view the various tasks due for a week. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you delimit the Monitoring of Tasks infotype. **This infotype is necessary for LOA benefits form letters to print**.

Comments function

The Comments function is useful as you are entering data (whether via an Action or a PA30). You can enter comments on many infotypes by selecting Edit > Maintain text from the menu (if Maintain text is grayed out, adding comments is not available for that specific infotype). A new window displays where you can enter comments. The standard for comments is to preface your remarks by the date and your name. Keep in mind the remarks must be professional. You cannot report from the comments. It is a best practice to make sure that you document all PA Actions or infotype revisions by entering the applicable documentation using the Maintain text option.

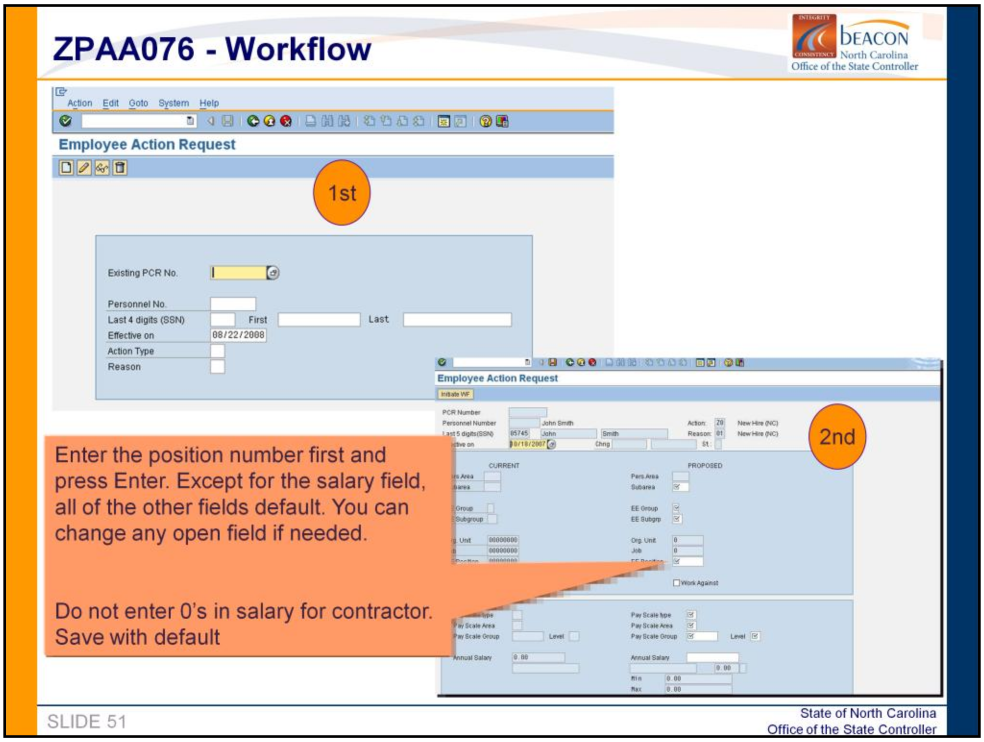


Notes

All PA Actions need approval before the Action can be executed. The BEACON SAP Workflow enables approvals (or rejections) to be obtained electronically. In your Agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, it may duplicate a portion of your manual process. You still have to provide the same type of documentation to the Approver that you have always provided -that has not changed. However, in BEACON SAP, you can attach documents to the Workflow as well as write notes.

NOTE: Keep in mind that the notes and documents associated with Workflow do not automatically move forward when processing the infotypes of the approved workflow document.

The authority to approve an Action is associated to the Position, and not to the person and person's role. If a person leaves an approver Position, the authority to approve stays with the Position. A person who is subsequently assigned to that Position, also assumes the approval authority (unless the Position is changed by Security).



Notes

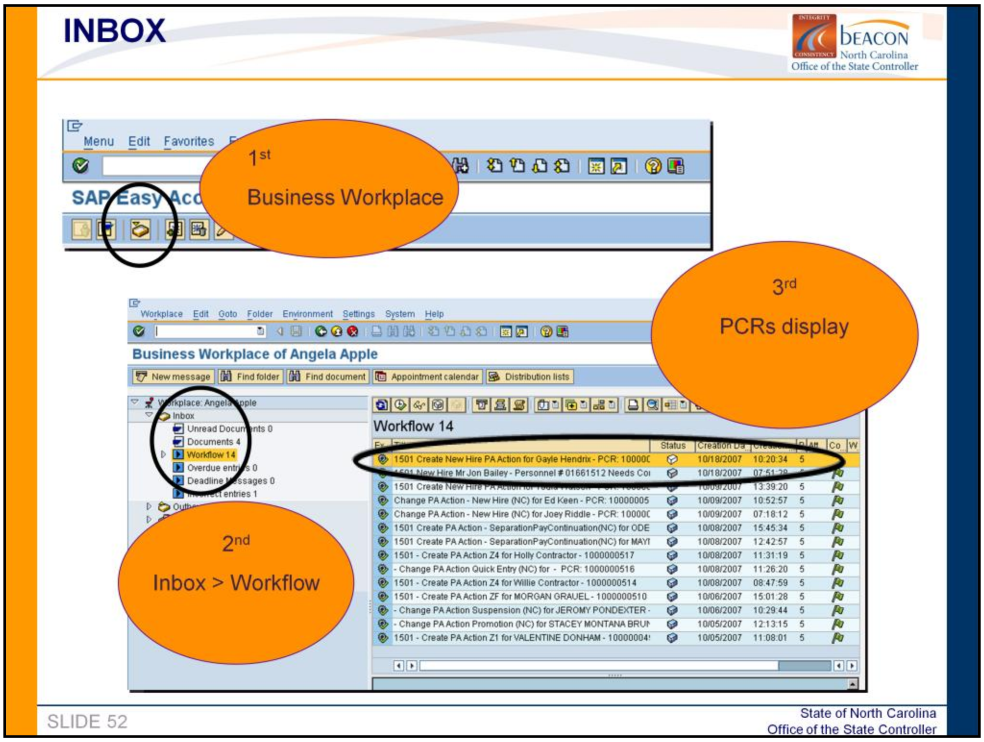
Use Transaction code **ZPAA076** to *initiate* the BEACON SAP electronic approval process, referred to as Workflow (WF).

On the initial *Employee Action Request* screen enter the applicable data. After the Action type and Reason is entered, the second *Employee Action Request* screen is displayed. This screen has two columns. The left column displays the current status of the employee. On the right, enter the new data pertinent to the Action being processed. If the employee is hourly, be sure that the Pay Scale Area field is “hourly”. Enter the hourly amount in the hourly field (not the annual salary field).

It is critical to review the data entry for accuracy before initiating WF. After WF is initiated, you will not be able to go back in and correct an error. In that case, you have two choices (a) contact the Approver and ask him or her to reject it so that it automatically comes back to you. You make the corrections and send back through the WF process, or, (b) if the WF has already reached Shared Services (SS), you will need to ask Shared Services to make the changes for you. You may also ask them to delete it so that you can create a new one.

When you initiate Workflow you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it.

After all the data is entered and WF is initiated, BEACON SAP sends the request to the appropriate Approver who can approve or reject the request (there may be more than one level of approval).

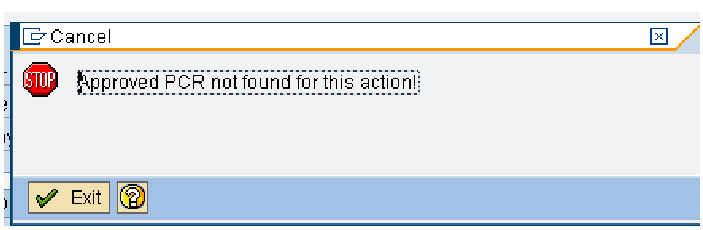


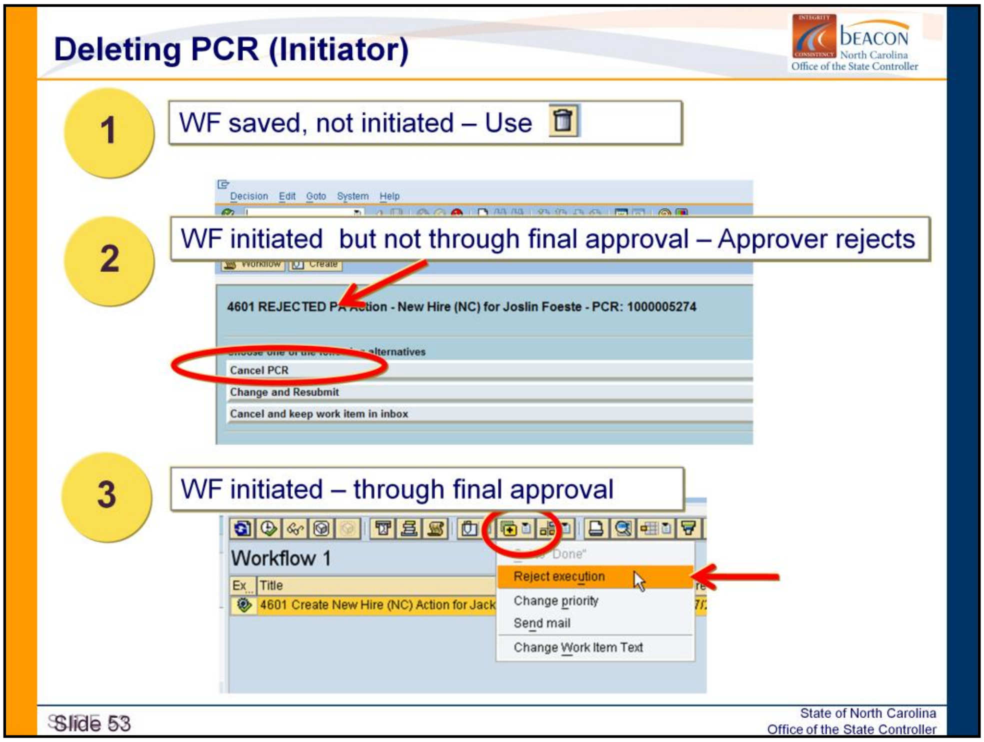
Notes

The second part of the Workflow is to see if your Workflow item has been approved or rejected. Go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click Inbox > Workflow. All the approved or rejected PCRs that you have initiated are listed on the right. Double-click the approved PCR, and the applicable screen automatically displays for the Action. You are now ready to execute the appropriate Action.

Workflow is always the first step before you initiate an Action. You do not use Workflow for PA 30 transactions. If you are ever in doubt whether Workflow is needed, access the Personnel Actions screen using PA40. If the Action is on the list, it must be processed through Workflow. If you attempt to bypass Workflow for an Action, you will receive the error message below, and not be allowed to continue.





Notes

The method you use to delete a PCR depends upon where it is in the process.

1. **You have saved the PCR but not initiated Workflow:**

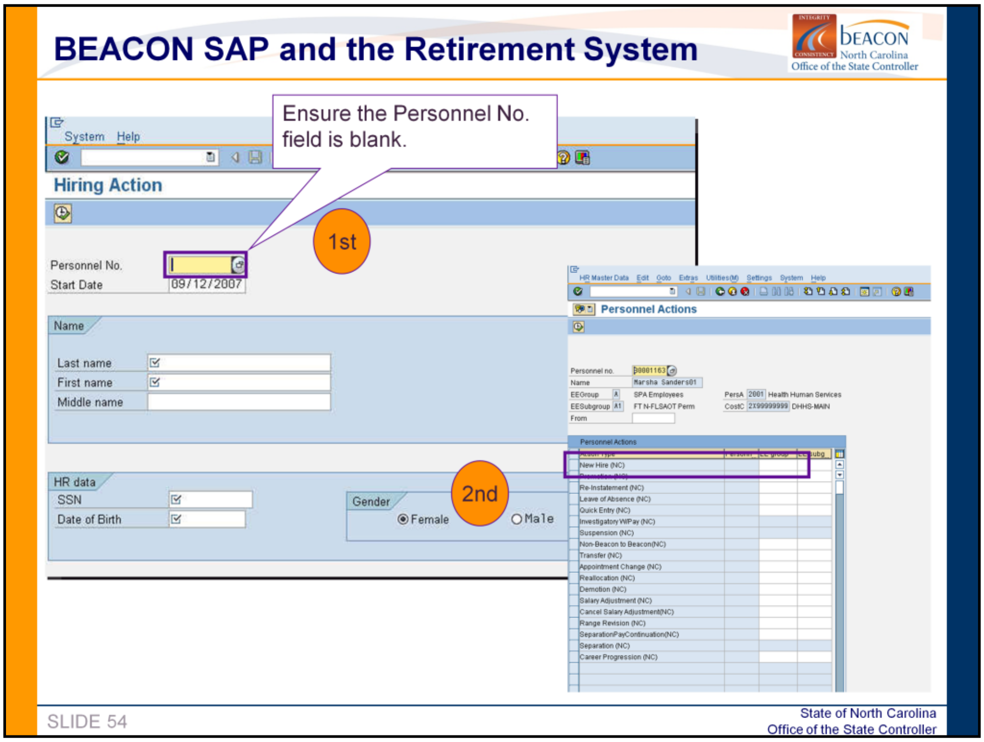
   From the ZPAA076 screen, use the delete button .

2. **You initiated Workflow but the PCR has not reached final approval:**

   Contact the Approver and request that it be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

3. **You initiated Workflow and PCR has been approved by final approver:**

   You can only use this option if you have **not executed** the PCR. Highlight PCR and click the “Other Functions” button. From the drop-down menu, select “Reject Execution” (see above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.



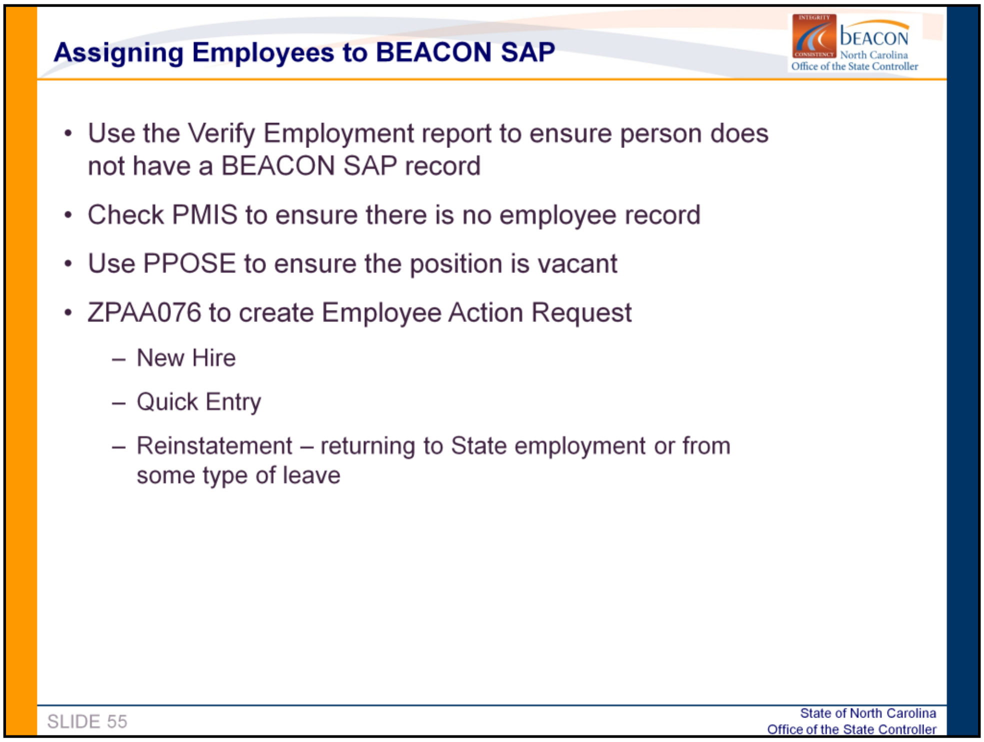
Notes

When processing a **New Hire**, the *Hiring Action* screen displays when you click the PCR from your inbox. The employee's basic data (name, gender, SSN, etc.) is entered. As you probably recall from *PA200-PA Overview*, the information is sent to the Retirement System, which is external to BEACON SAP. The Retirement System assigns an external Personnel Number. **A word of caution**: ensure that the Personnel No. field is blank. If you have recently processed a New Hire, the Personnel No. field may be pre-populated with that previous number.

After the Personnel Number is assigned, the Personnel Action screen is automatically displayed. You will then select the New Hire action and continue entering the necessary data to complete the transaction.

CAUTION! Never manually assign a personnel number (although BEACON SAP will not prevent you from doing so). Manually assigning a number causes the employee personnel number to be out of sync with the Retirement System.

NOTE: If the Retirement System is down and you need to initiate a New Hire, contact BEST Shared Services for assistance.



The three Actions described below are used to assign an employee to BEACON SAP. It is important to understand when to use each specific Action before you enter employee data. In addition, follow State policy regarding effective hire date when first day worked follows a beginning payroll period after a weekend or holiday.

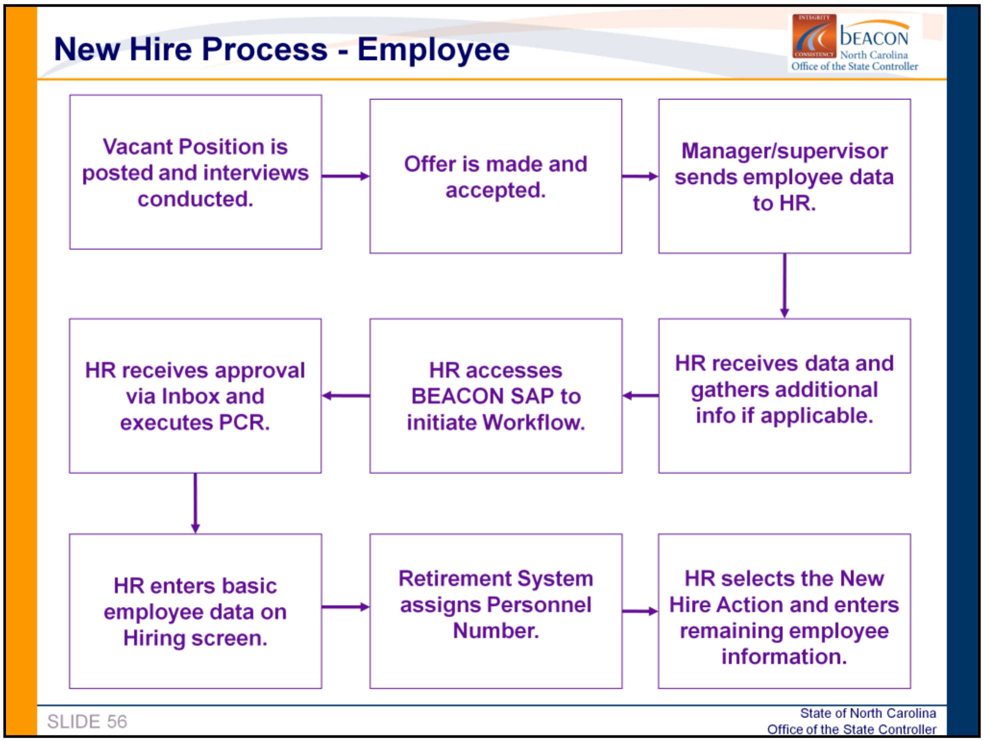
Before an employee is entered into BEACON, use the BI *Verify Employment* report found in the Cross Agency Verification **folder** to search for the employee by name and date of birth to ensure that he or she in not already in the system. In addition, check PMIS to ensure that no record is found. The New Hire Action is only applicable if the individual is not in the BEACON SAP system nor PMIS. If the employee was a former employee in PMIS, but not BEACON SAP, you **do not use** New Hire. That Action (Non- BEACON to BEACON) will be discussed in the subsequent advanced course, PA410. You should also use the **PPOSE** transaction to ensure that the Position to which the employee will be assigned is vacant.

New Hire is used to create a personnel record for a newly hired employee who has never been employed by any State agency. This Action includes employees who are temporaries, pickup firefighters, and National Guard.

Quick Entry is used to hire contractors, dual employment borrowing, volunteers, board members, and federal employees who are to have access to BEACON SAP.

Reinstatement is used to return employees to State employment or return them from some type of leave. As mentioned earlier, if the employee is in PMIS, but not in BEACON SAP, you use Non-BEACON to BEACON, not the Reinstatement Action.

Notes



Notes

As the New Hire diagram illustrates, there are several steps that must take place outside of BEACON SAP before a New Hire Action is executed in BEACON SAP. The process described is for hiring new employees. The New Hire transaction is not used if an individual is being hired as supplemental staff, such as contractor, federal, or board member. In these cases Quick Hire is used.

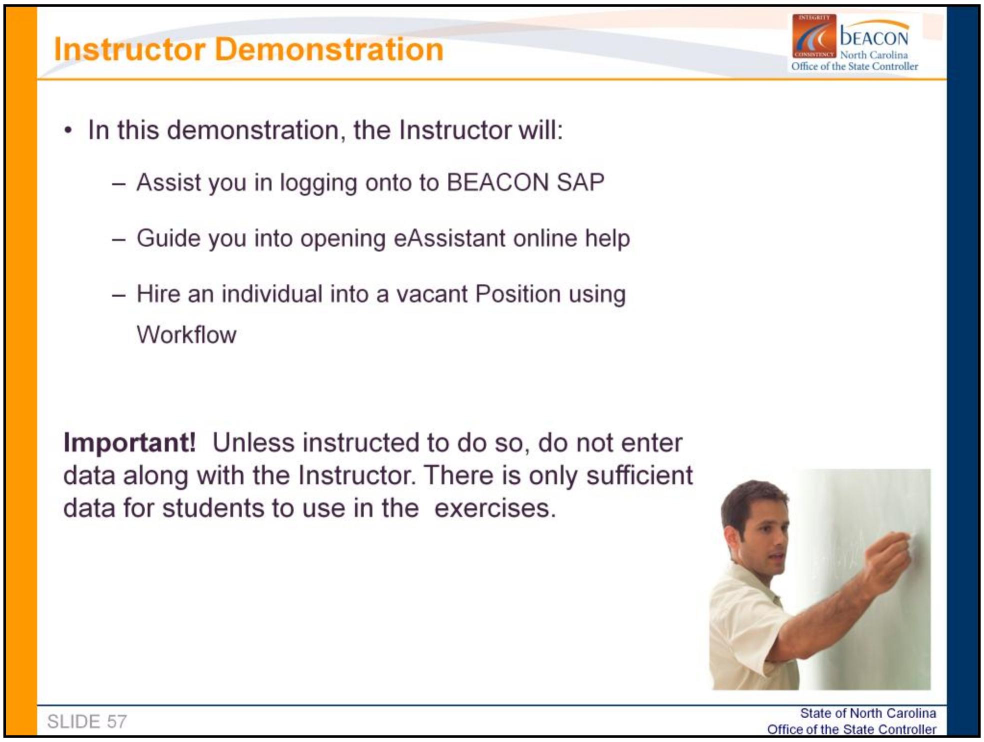
Before an individual can be hired, a vacant Position must exist. The vacancy occurs because (1) an existing Position was vacated, or (2) a new Position for an organizational unit was approved and established by the State. Each type of vacancy must be posted in accordance with State policy.

After the vacancy posting time frame has expired, all qualified candidates are interviewed. A qualified candidate is selected and sent a State-approved Offer Package. After the candidate receives and accepts the Offer, the Manager or Supervisor sends the new hire information to HR via manual form, email, phone call, fax, or other distribution method.

HR initiates the Workflow approval process. The initiator of the Action reviews his or her Inbox to see when the final approval is received. After the initiator activates the PCR from the Inbox, the Hiring Action screen is automatically displayed. HR completes basic data on the Hiring screen, and it is automatically sent to the State Retirement System for a Personnel Number assignment. HR chooses the New Hire Action to continue entering the new hire data.

Reason for the New Hire

- New Hire
- National Guard
- ENR DFR Pick-up Fire



Notes

The Instructor will access eAssistant and then assist you in accessing the BEACON SAP. After all have logged on, watch the Instructor complete the Action, using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

It is important that you do not enter data during the demonstration; the training database only has enough data for students to use during exercises. If you use data during the demonstration, you are using data that has been designated for other students. This will prevent them from being able to complete their exercises.

Exercise #3.1

- New Hire

The Cultural Resources Library is undergoing a digitization process and will hire a new Digitization Clerk into its organizational unit (20010287). The new employee will begin working today at the minimum of the salary range. The new employee will be issued a badge and two keys. The employee's military status is Reserve.

Initiate Workflow to begin the new hire process.

- **Important:** You will use this data in subsequent exercises. Be sure to complete all exercises.

SLIDE 58

State of North Carolina
Office of the State Controller

Notes

EE Group/Subgroup

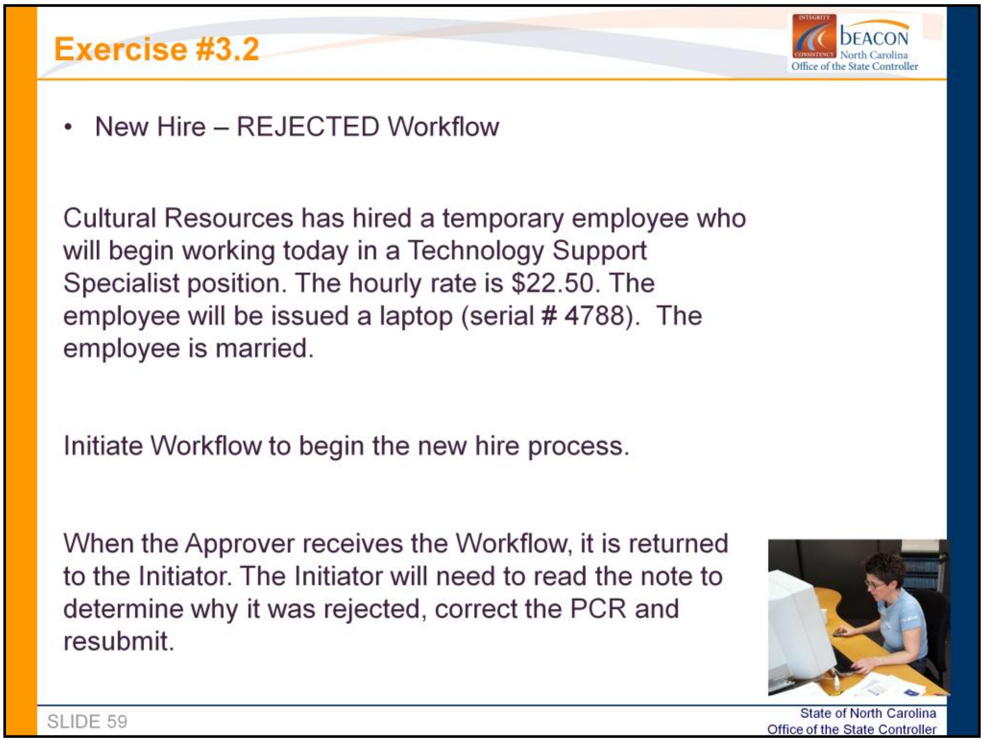
BEACON SAP defaults the Employee Group of all new hires as a **permanent** employee. When you are entering new hire data, you must change the Employee Group on Workflow as applicable if you are entering a probationary, time limited or trainee employee.

Bank details

The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing.

Manually Adding Performance Infotype

There is a time frame between mid-April and June 30 every year that you will have to manually add the Performance Rating Infotype on all new hires. See the BPP for details.



Notes

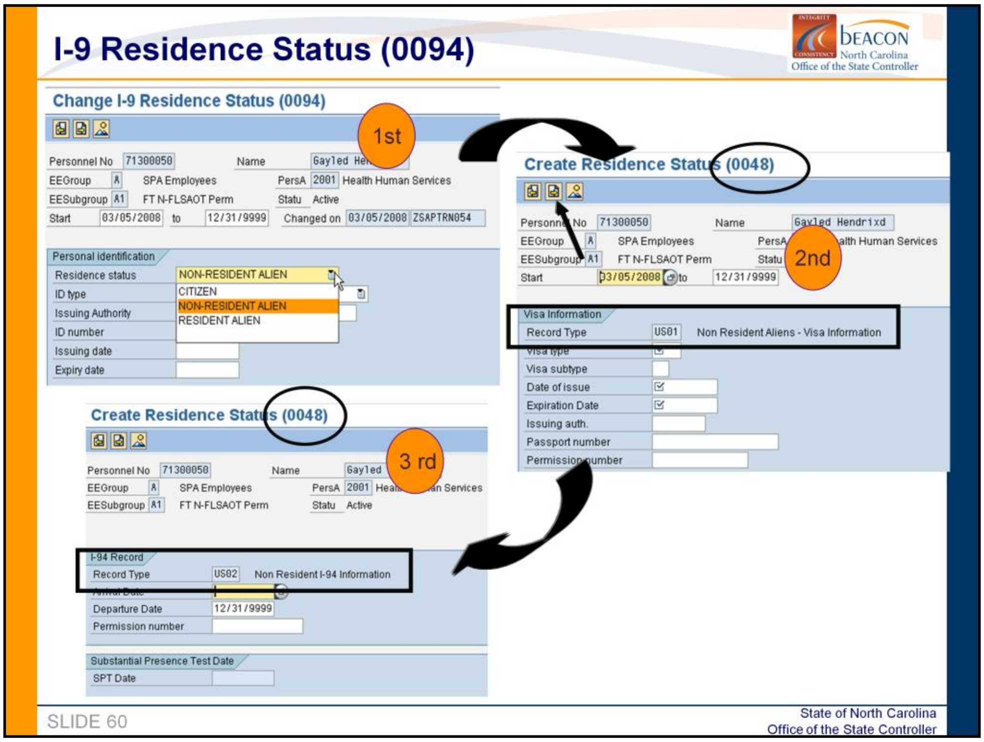
Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Rejected Workflow

When an Approver rejects a Workflow PCR, he or she is required to write a note to the Initiator. In order to read the note, make the correction and re-submit the PCR, the Initiator must use the following steps:

- Access the *Workflow Tracker* link from the Inbox.
- Click *Change and Resubmit* at the Decision Step screen.
- Enter the applicable correction and click Save.
- Click the Back button.
- Click the *Complete Workflow Item* button. This re-submits the corrected PCR to the Approval process.

This exercise is designed to give you the opportunity to received a rejected PCR and read the accompanying note.



Notes

Based on the selection you make in the **Residence Status** field on the *I-9 Residence Status (0094)* infotype, additional infotypes will display (as a reminder, you chose Citizen in both New Hire exercises). Remember also that you must still enter non-citizen employees into Windstar (the official record keeping system for the State).

Non-Resident Alien

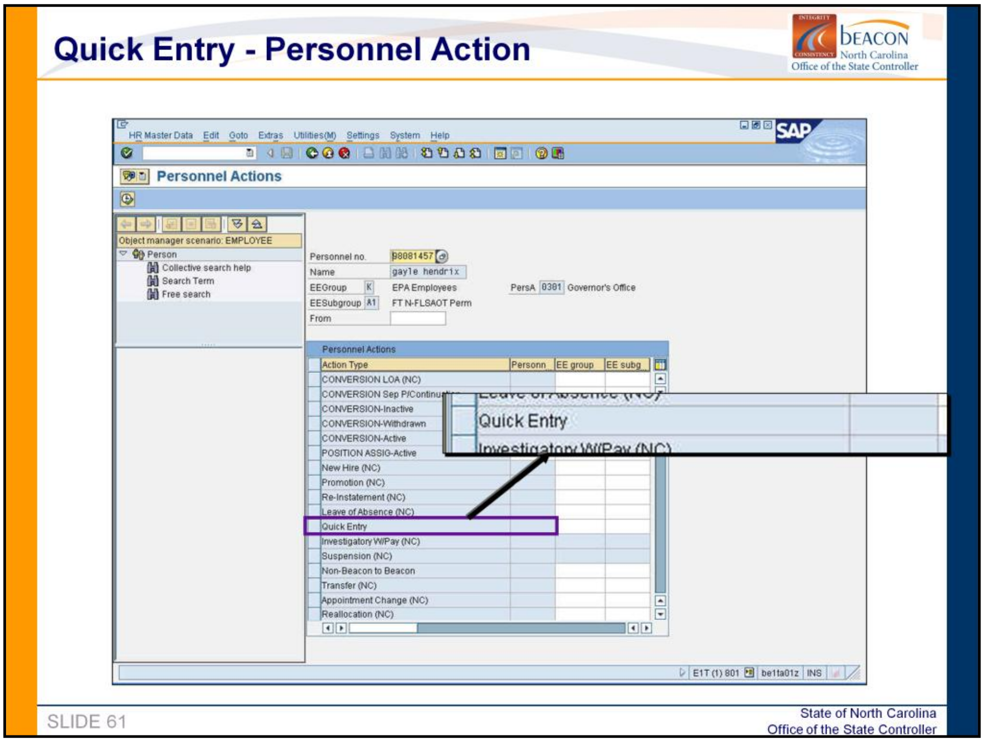
When you select Non-Resident Alien on infotype 0094, there are two *Create Residence Status (0048)* infotypes that display (see illustration above) in the following order:

- Record type: US01 Non-Resident Aliens – Visa Information
- Record type: US02 Non-Resident I-94 information

You determine which 0048 infotype you need to use: US01 or US02. If you do not need US01, use the **Next Record** button to page forward to US02.

Resident Alien

When you select Resident Alien on infotype 0094, only one *Create Residence Status (0048)* infotype is displayed. In the **Residence status** field, select the applicable type from the list. There are 57options in the drop-down list, including both US01-Non-Resident Aliens Visa Information and US02-Non-Resident I-94 Information.



Quick Entry assigns <u>specific</u> <u>categories</u> of employees to the BEACON system as State staff. These employees are not paid through BEACON, but may supervise employees paid through BEACON or may need access to the BEACON system for other purposes. Because Quick Entry is an Action, it must be initiated via Workflow (ZPAA076).

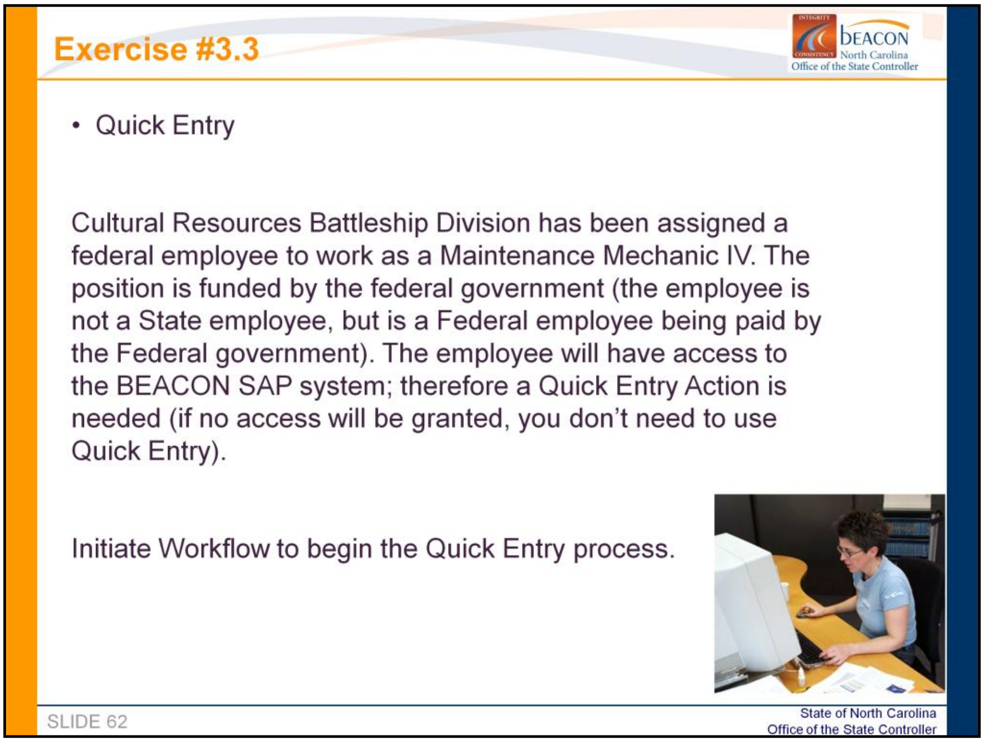
You only need to use Quick Entry if you want the employees in the categories listed below to have access to BEACON SAP. If you do not want them to have BEACON SAP access, do not enter them into the system.

- Contractors
- Volunteers
- Federal Employees
- Board Members
- Borrowing Employees/Dual Employment

BEACON SAP does **not** send the Quick Entry data to the Retirement System for an external Personnel Number. Instead, the BEACON system assigns an internal 8-digit personnel number, in sequential order.

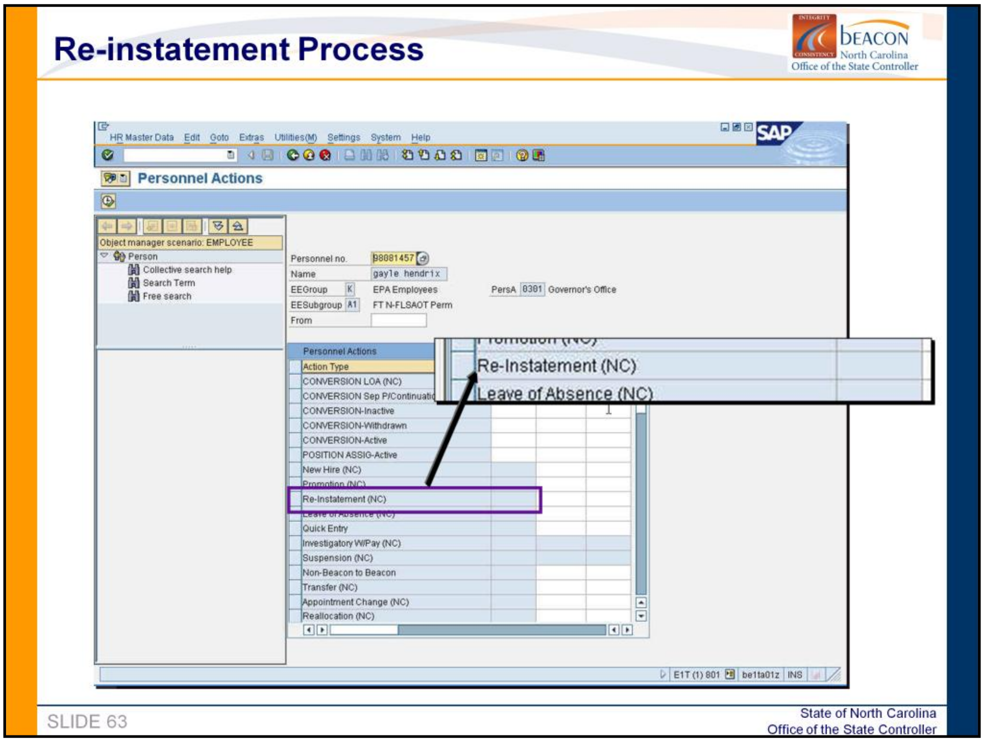
Please Note: The data entry convention for the social security field for Quick Entry is 999-9x-xxxx. “X” stands for the last **5 digits** of the employee’s social security number (SSN). This helps ensure that if these Quick Entry employees ever become a regular state employee, they won’t have an existing SSN in BEACON SAP.

<u>Notes</u>



Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.



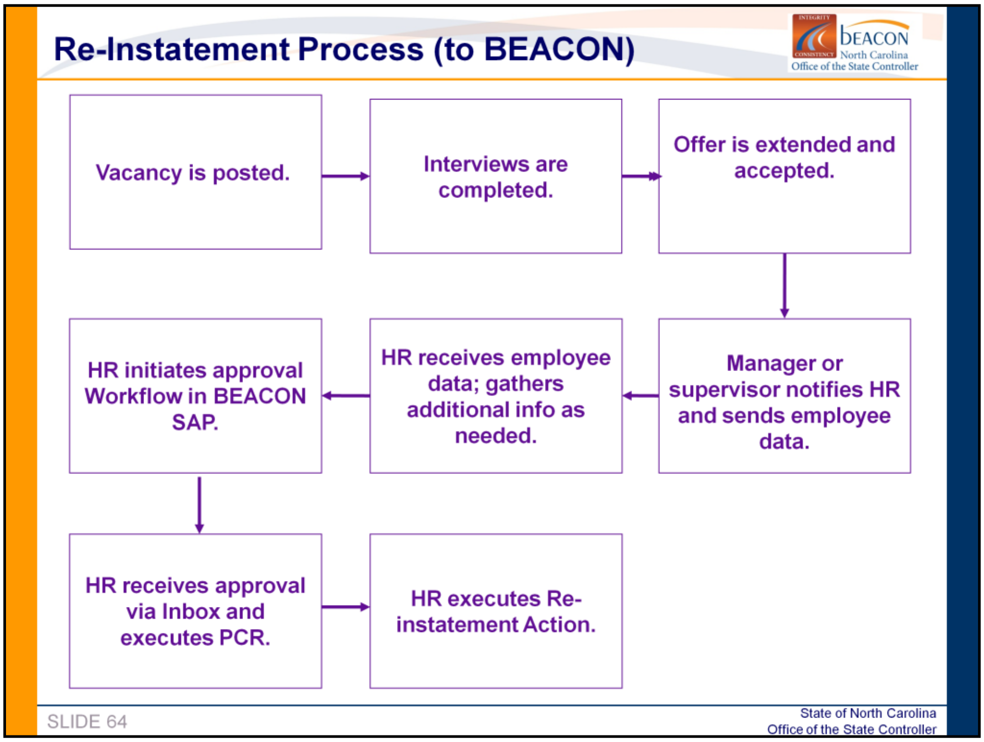
Reasons for Reinstatement

- Return to State within 12 months (same salary grade)
- Return to State within 12 months (higher salary grade)
- Return to State within 12 months (lower salary grade)
- Return to State within 5 years
- Return to State after 5 years
- Return from Short-Term Disability Trial Rehab
- Return from Short-Term Disability Complete
- Return from Long-Term Disability
- Return from Disciplinary Suspension
- Return from Investigatory Placement
- Return from Military Leave
- Return from Workers' Comp Trial Rehab
- Return from Workers' Comp Complete
- Return from Educational Leave
- Return from FMLA
- Return from Family Illness
- Return from Parental
- Return from Other-Leave
- Return to Supplemental

Sick Leave Balance

Before you process a Reinstatement Action for a withdrawn employee, view the ending leave balance (IT2006 – Absence Quotas). If the employee is returning **within five years** of separation, create Infotype 2013 – Quota Corrections (PA30) and enter the sick leave balance that was left.

Notes

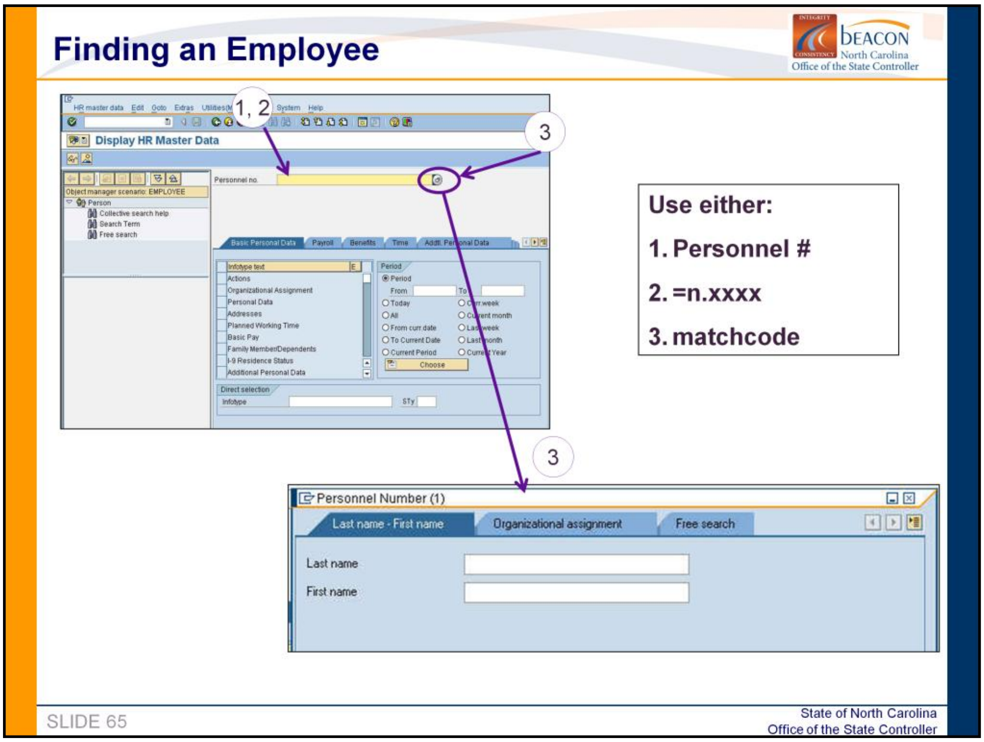


Notes

Although there is only one Reinstatement Action, there are two instances in which it is used: (1) returning an employee from LOA (covered in *Advanced Create and Maintain Employee Data*) or (2) reinstating a former BEACON employee (who has a record in the BEACON system). The difference between the two are the number of infotypes the Action presents. When you are returning an employee from LOA, you are presented with fewer infotypes than when you are returning a previous BEACON employee to employment. In the latter, you are presented with the same number of infotypes as a New Hire Action. The above process describes a Reinstatement other than from LOA.

Employees who separated within three months of cutover to BEACON were converted into the system. Therefore, if any of those employees come back to work for the State, you should use the Reinstatement Action.

Cost Distribution Infotype (0027) This infotype is assigned to every position, however, when an employee is separated, the position defaults to 99999999. When an employee is separated, the cost distribution is assigned to the employee. This ensures that employees who receive any type of payment after separation will be able to receive those payments. During a Reinstatement Action, you will be presented with the Cost Distribution Infotype (0027). In this case, you will delimit the infotype, because it should no longer be assigned to the employee, but should revert back to the position.



Notes

Finding employees
Before you can process existing or previous employee data you must access the employee's record. There are a variety of ways you can search for an employee:

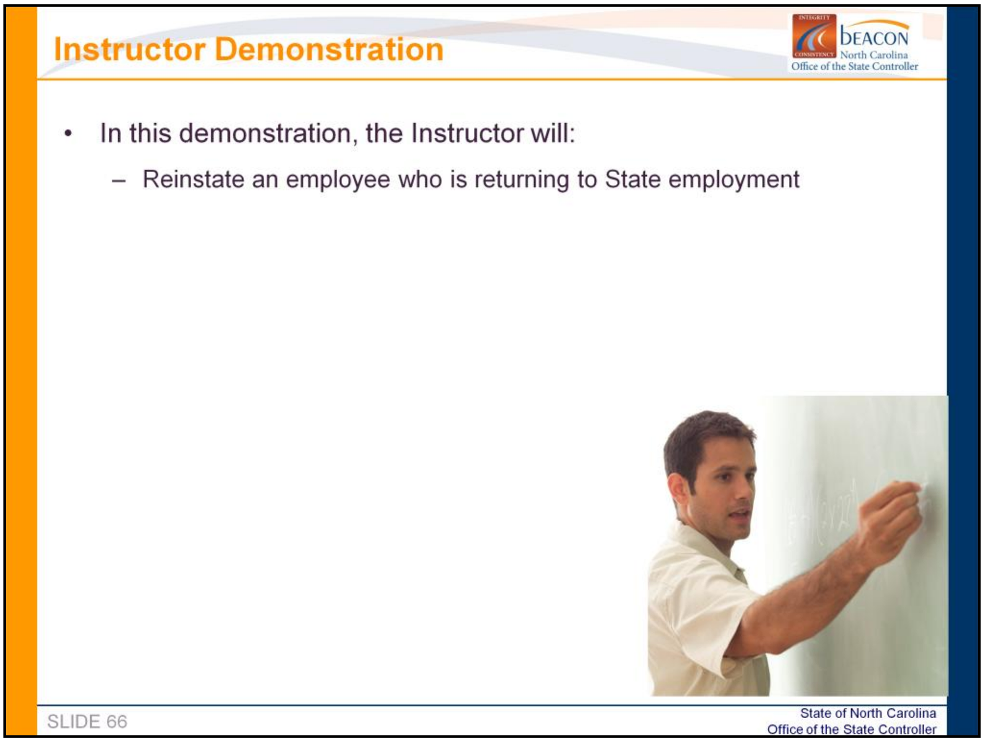
1. ***Personnel Number:*** Enter the Personnel Number into the *Personnel no*. field.
2. ***Shortcut*** : Use a shortcut **(=n.xxxx)** in the Personnel No. field to search by last name.

   (**Example:** =n.hendrix - NO spaces.)

   A list of all employees with that last name displays. Double-click to select the appropriate employee.
3. ***Matchcode:*** Use the Match code at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

Verifying the Action is appropriate

Before you initiate an Action on a current employee, it is a best practice to verify that the Action you are about to take is applicable. For example, you cannot reinstate an employee who does not have a Separation Action as the current record. Use PA20 and the overview of the Actions infotype to verify that the Action you are about to take is appropriate.



Notes

Position default number
Observe on the Organizational Assignment infotype that the employee's Position number defaulted to one with a series of 9's. When an employee is separated, his or her position always defaults to 99999999.

As indicated earlier, prior service is not entered during the New Hire, Non-BEACON to BEACON or Reinstatement Actions. After you verify that the employee is entitled to prior service, you must access PA 30 and enter the dates of prior service on infotype **Time Specification/Employ. Period (0552)**.

Viewing previous employee data

If your security access permits, you can see some of the information concerning employees in other Agencies. Run the Verify Employment report found in the Cross Agency Verification folder to view the employee's personnel record.

Exercise #3.4

- Reinstatement

Karla Hart formerly worked with the State of North Carolina and left for the private sector. After only a few months, she decided to come back to the State. The employee is returning to Cultural Resources as an Information & Communications Spec I, which is the same position (salary and grade) that she held before she left. The salary is the minimum of the salary range.

The effective return date is today. She completed the requirements to become a licensed counselor while she was away (see below).

Some of the employee's information changed while other information remained the same.

Initiate Workflow to begin the process.

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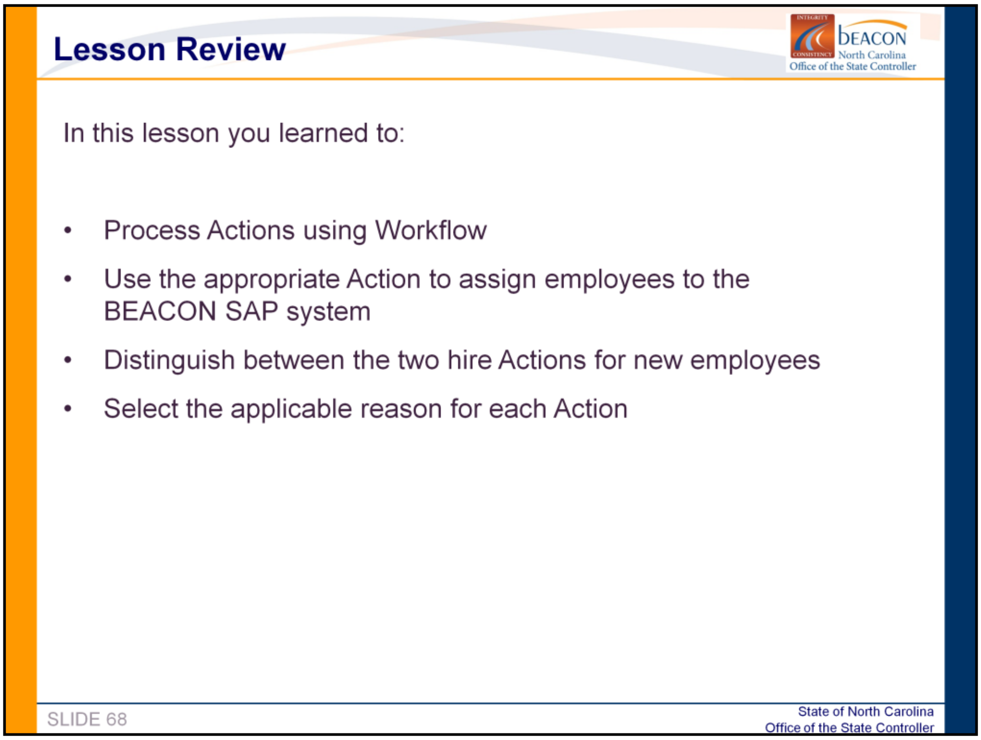
State of North Carolina
Office of the State Controller

Notes

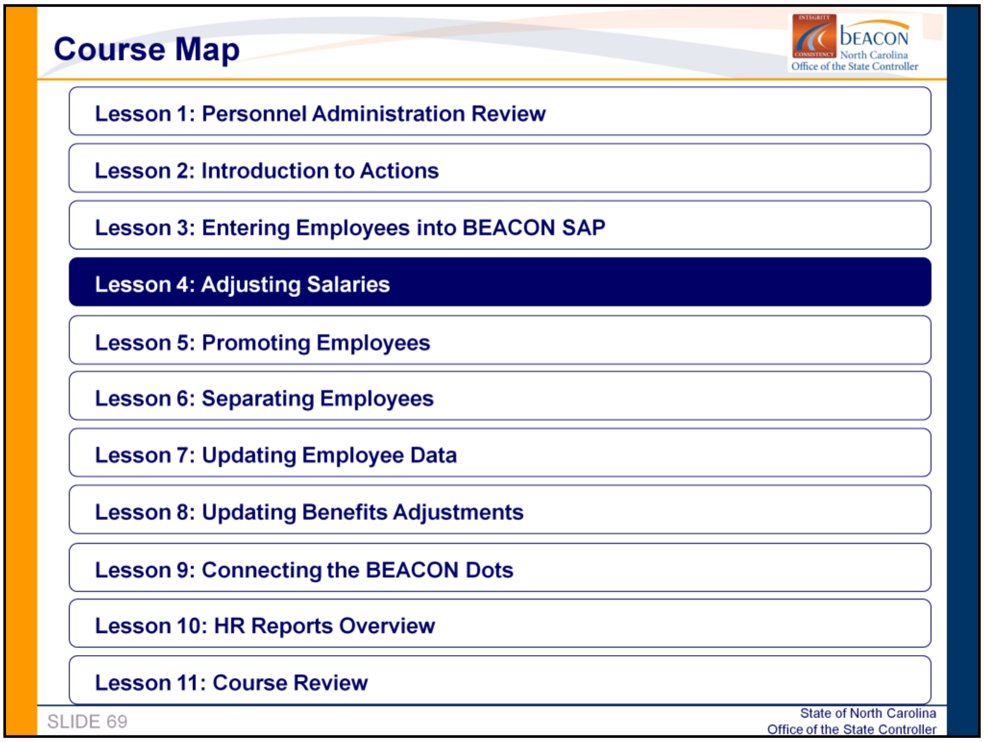
NOTE: In your work environment, a certification or license is only added when it is a requirement of the position. In Karla's case, the license is not a requirement but is being presented here to provide the training experience.

In this exercise some of the employee's information, like addresses, has changed since she was last employed by the State. Make the changes as applicable during the Reinstatement Action; however, remember to save a pre-populated infotype even no changes were made to it.

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Process Actions using Workflow
• Use the appropriate Action to assign employees to the BEACON SAP system
• Distinguish between the two hire Actions for new employees
• Select the applicable reason for each Action
SLIDE 68
State of North Carolina
Office of the State Controller

Notes


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Personnel Administration Review
Lesson 2: Introduction to Actions
Lesson 3: Entering Employees into BEACON SAP
Lesson 4: Adjusting Salaries
Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
SLIDE 69
State of North Carolina
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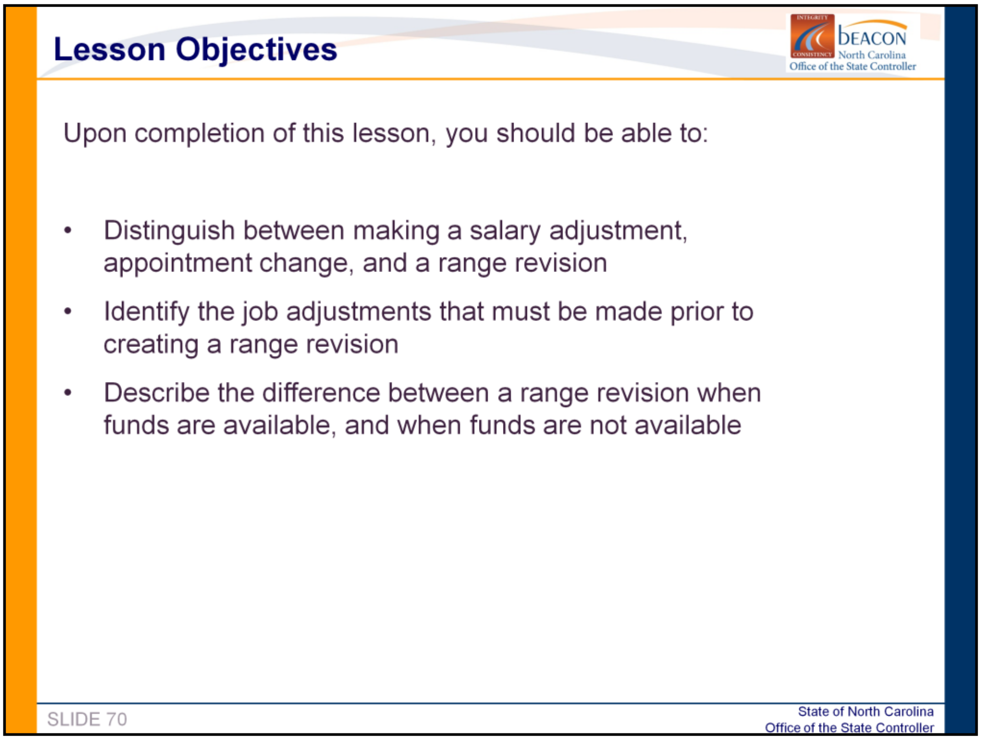
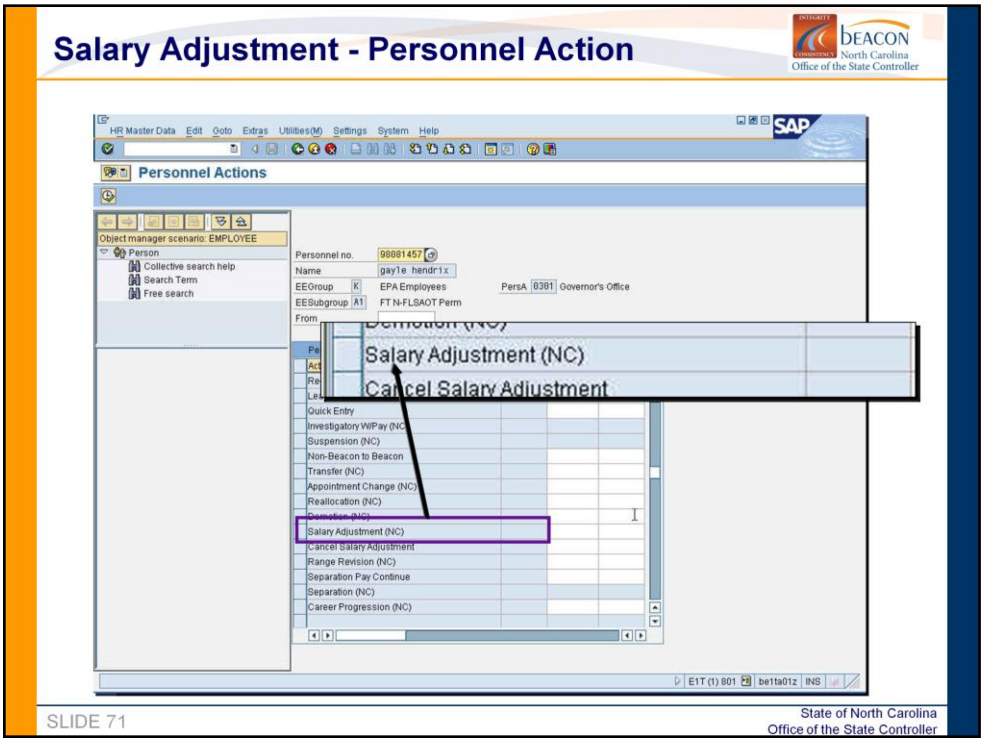
Notes


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Distinguish between making a salary adjustment, appointment change, and a range revision
• Identify the job adjustments that must be made prior to creating a range revision
• Describe the difference between a range revision when funds are available, and when funds are not available
SLIDE 70
State of North Carolina
Office of the State Controller

Notes

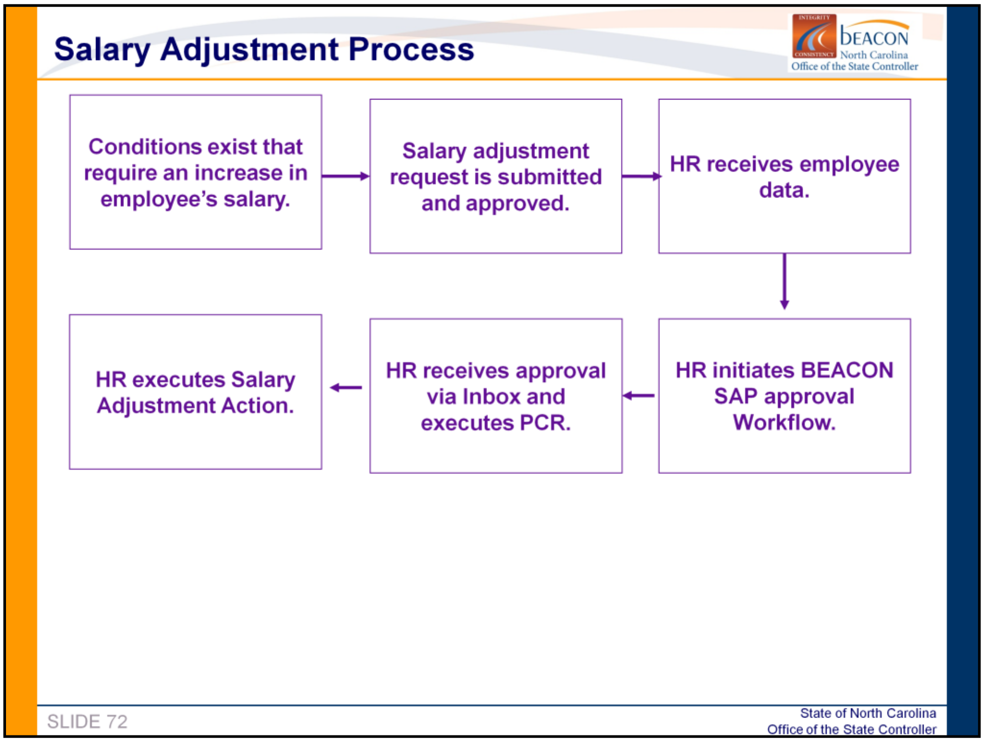


Notes

Reasons for Salary Adjustment

- Salary Adjustment
- Retention Adjustment
- Lead Wkr Adjustment
- In-range–Higher Lvl
- In-Range–Equity
- In-Range-Turnover
- Geographic Differential
- CGRA
- Performance Increase
- Acting Pay
- Trainee Adjustment
- EPA Supplemental Pymt
- In-Range – Incr Var
- In-Range – Retention
- In-Range – Oth Labor Mkt
- Site Differential
- Legislative Increase
- LEO Sworn

NOTE: Some of the reasons above apply to career banding and some do not. If you do not see the applicable reason in Salary Adjustment for career banding, you will use the Career Progression Action (covered in PA410).

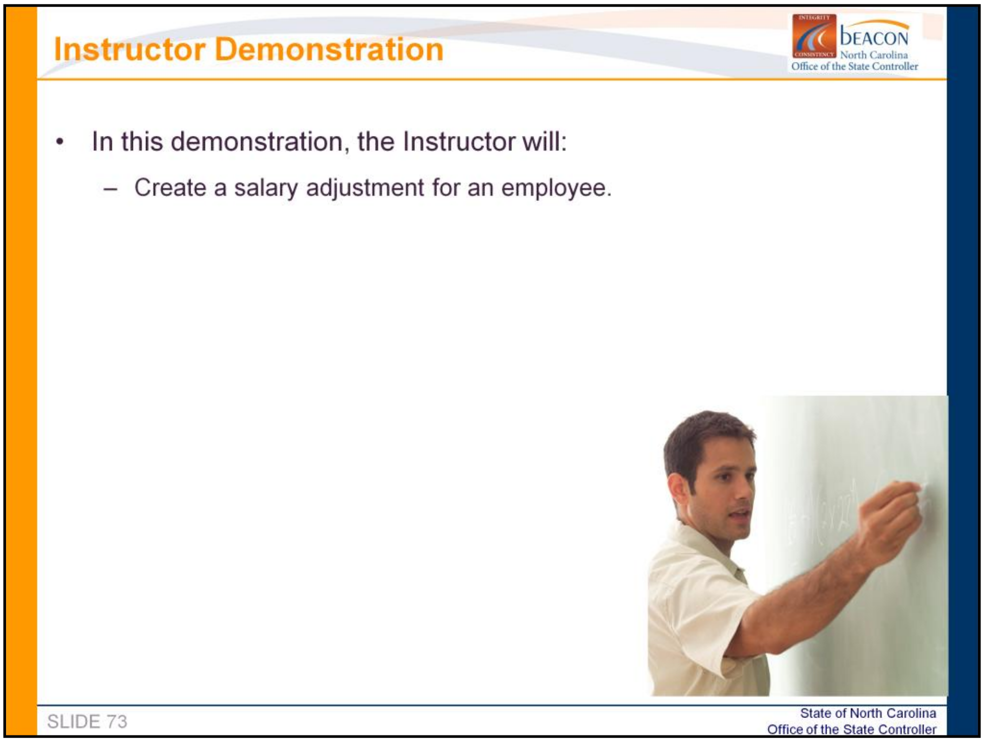


Notes

A Salary Adjustment is an increase in an employee's salary within the employee's current salary range and within the Agency where the employee is currently employed.

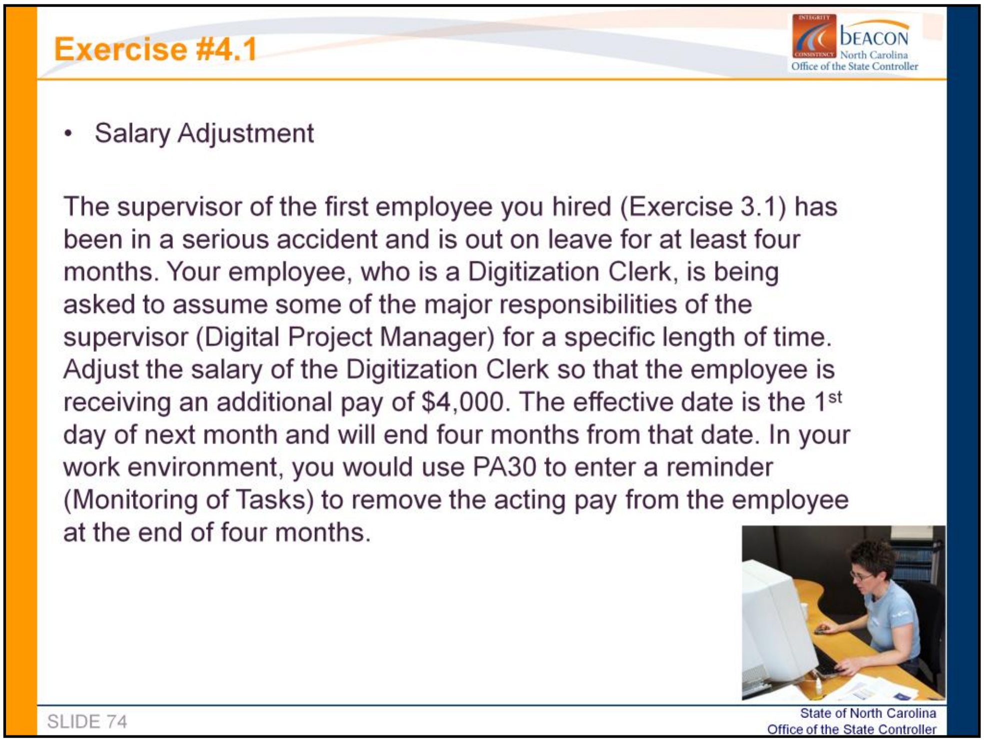
Cancel Salary Adjustment Action

If you give a salary adjustment for any of the reasons listed on the previous page and later determine that it needs to be canceled, use the Cancel Salary Adjustment Action. The same reasons for the Salary Adjustment Action are applicable for the Cancel Salary Adjustment Action.



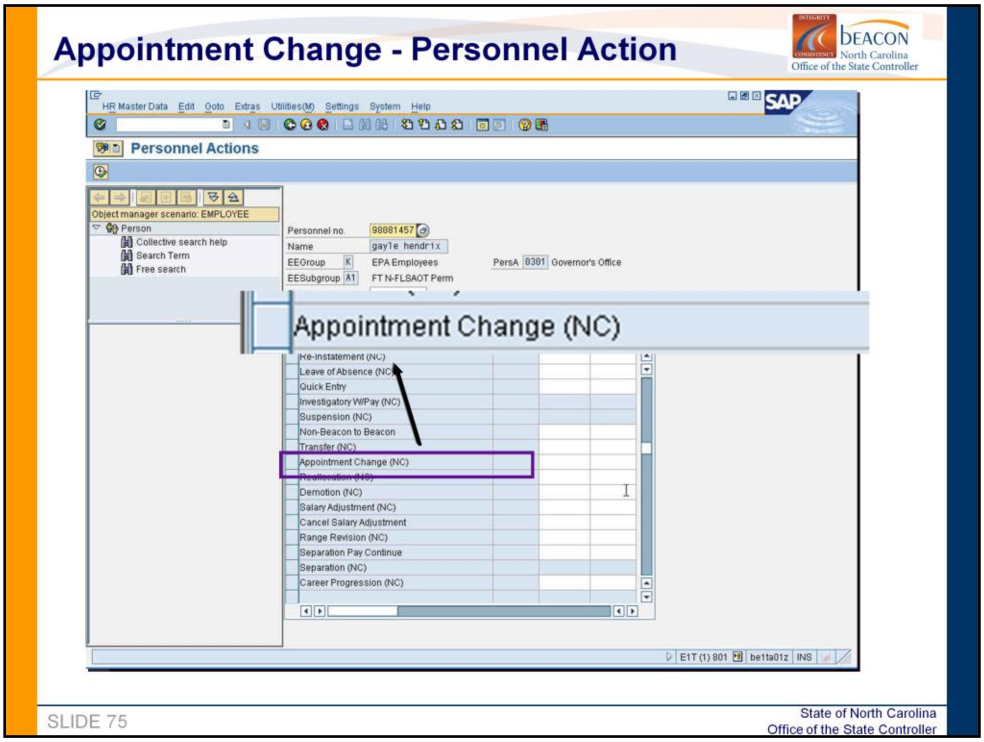
Notes

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.



Notes

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

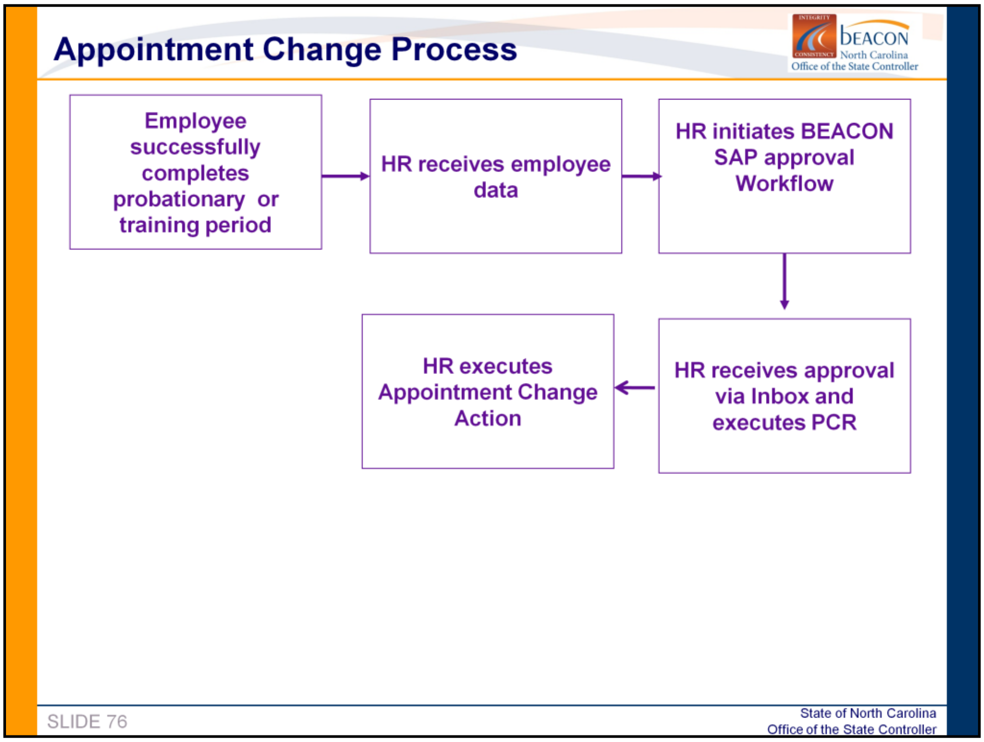


Notes

Reasons for Appointment Change

- Trainee to Permanent
- Time-Limited to Permanent
- Probation Time-Limited to T/L
- Part Time to Full Time *
- Full Time to Part Time *
- Change in hours *
- Exten of Appt - no money involved
- Supplemental to Probation
- Supplemental to Permanent
- Intermittent to Probation
- Probation to Permanent
- Permanent to Time Limited
- Permanent to Supplemental
- Permanent to Intermittent
- Change in FLSA

*** NOTE**: Do not merely change the hours on IT0007; use the Appointment Change Action as applicable.



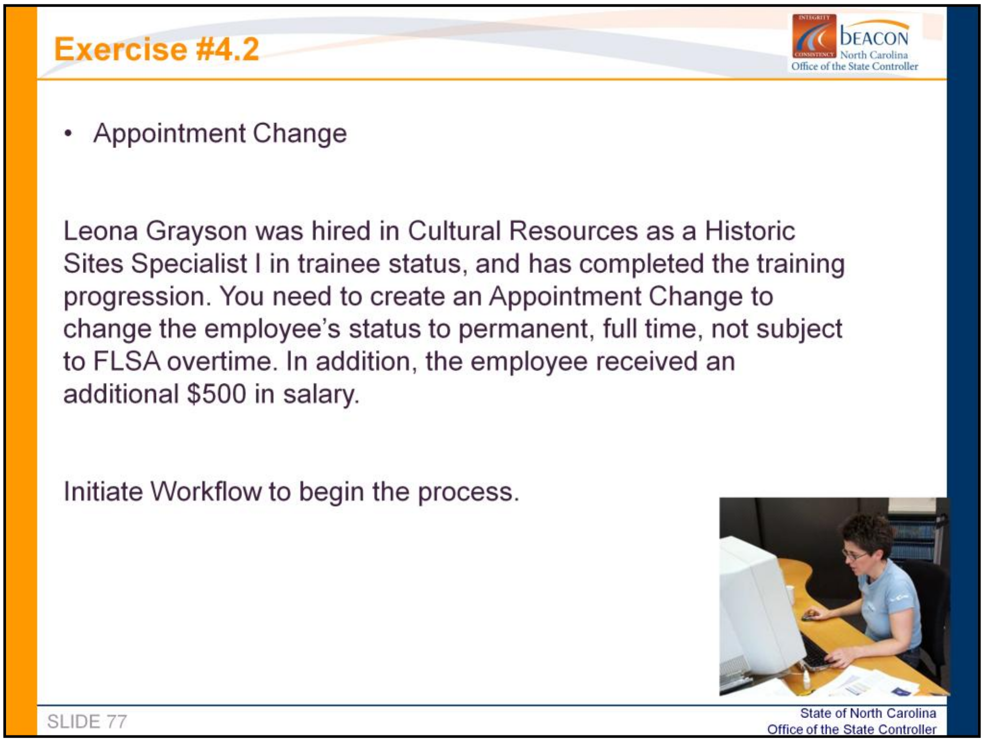
Notes

An **Appointment Change** occurs when an employee has successfully completed his or her probationary or training period and receives an appointment to either a permanent or a time-limited position. Based upon the supervisor's recommendation, the employee may transition from probationary (or training) status at anytime from 90 days to nine months. In order for the employee to receive an increase in salary, an Appointment Change Action (rather than a Salary Adjustment Action) must be used. This is because the <u>employee subgroup must be changed</u>.

When you create an Appointment Change, not all infotypes that display will require that you change information. Your Agency, as well as the type of appointment change, determines this. Here are some of the infotypes or fields that you <u>may</u> need to change:

- Employee Subgroup
  - if moving from Full-Time (FT) to Part-Time (PT), or vice versa
  - if moving from probationary or trainee to permanent
- Planned Working Time - if moving from FT to PT, or vice versa
- Basic Pay - if salary has changed (usually changes with trainee-to-permanent)
- Monitoring of Tasks – example, trainee progression

The Appointment Change Action allows you to give the salary increase at the same time you modify the Employee Subgroup (a Salary Adjustment Action only allows you to modify the salary).



Notes

Employee Subgroup

Keep in mind when you save the Copy Actions (0001) infotype for this type of scenario, the employee subgroup determines if the employee is eligible for overtime.

Basic Pay (0008) – USD or USDN

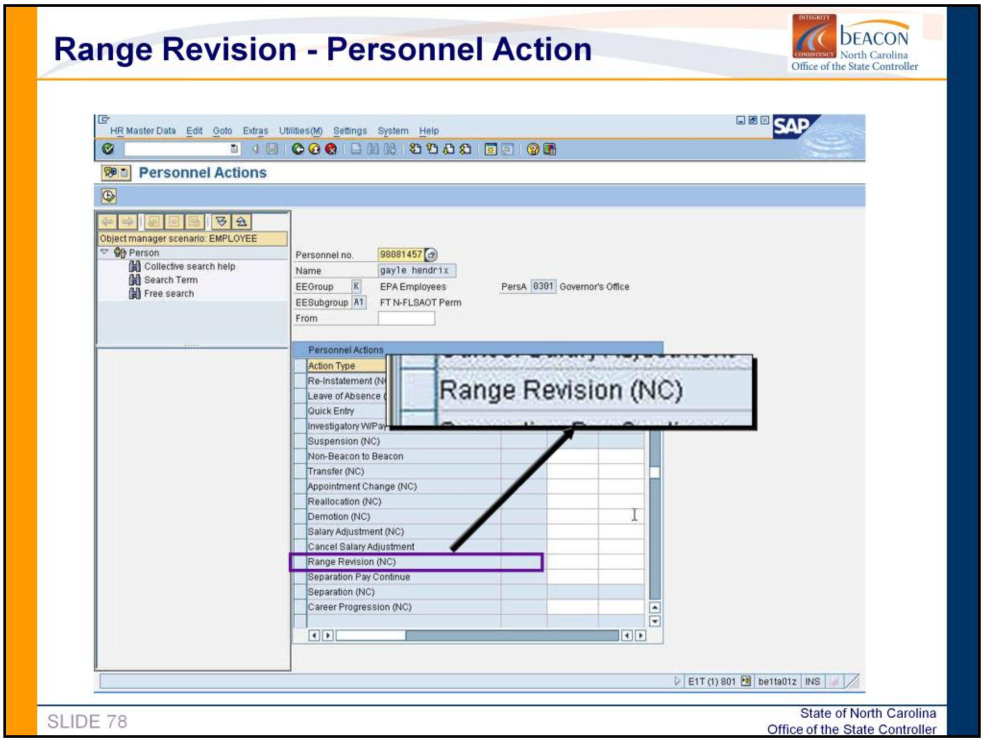
Observe that on the salary infotype (0008) the value is USD. However, if the employee was a permanent DOT employee, the field would read USDN because DOT permanent positions require 5 decimal currency. In that case, BEACON SAP will automatically change the USD field to USDN. The 5 decimal currency rule does not apply to DOT temporary employees.

Changing temporary employees to permanent employees

If a temporary employee accepts a permanent position, one of the following is applicable:

1. If they change position numbers it is either a Transfer or a Promotion.
2. If they don't change position numbers it is an Appointment Change. You will also modify the salary as applicable in the Appointment Change Action. Be sure to justify salary in Maintain Text.

Caution! If the Action moves the employee from one payroll type to another (bi-weekly to monthly or monthly to bi-weekly), you only initiate the Workflow. When the Workflow is approved, you contact BEST to complete the Action.



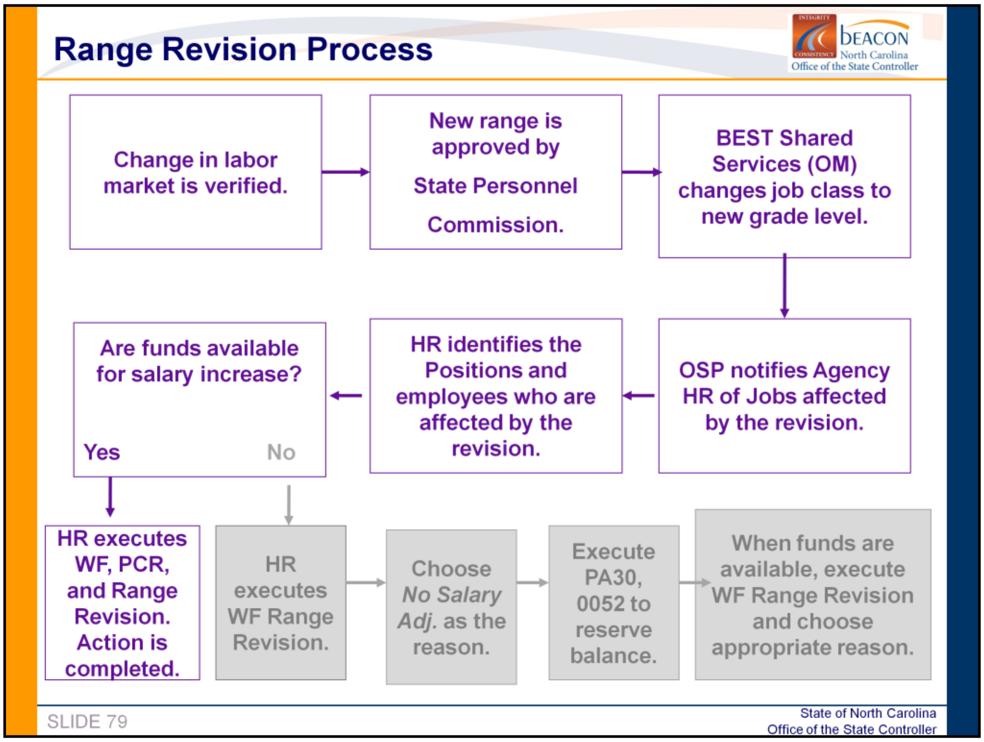
Notes

Reasons for Range Revision

- Range Revision Full
- Range Revision Partial
- Range Revision after Effective Date Complete
- Range Revision after Effective Date (Retro to Min)
- No Salary Adjustment

The reason, *Range Revision Partial* ,is used when an employee is receiving only part of the funds. At a later date, if additional partial funds are released, you will create a new Range Revision and use partial as the reason with the new effective date, and not the date of the original Range Revision Action. Of course, if the additional released funds are for the full amount, you would use “Range Revision after Effective Date Complete” (with the current date) instead of Range Revision Partial.

The reason *Range Revision after Effective Date (Retro to Min)* can only be used to bring an employee up to the minimum.



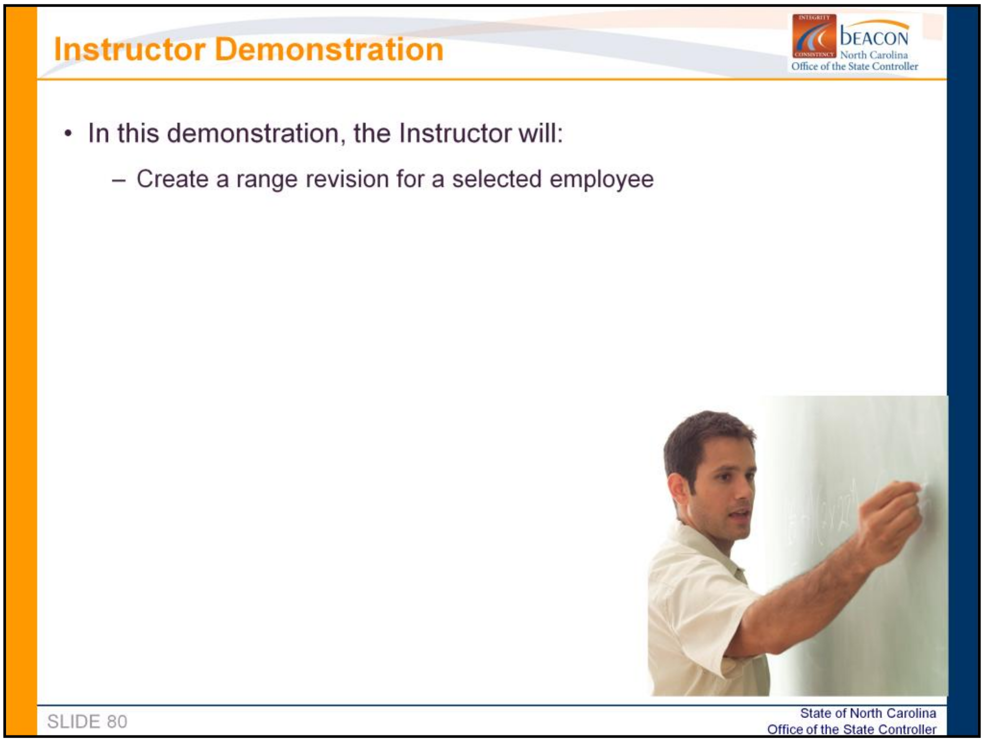
Notes

Range Revision is a change in the salary range, resulting from changes in the labor market. Any salary range change must have the approval of the State Personnel Commission (SPC). The revision may result in a change to the minimum and maximum, to the minimum only, or to the maximum only.

After the SPC approves a salary range revision, BEST Shared Services OM will make changes to the Job class. This must happen before Personnel Administration can initiate the Range Revision in BEACON SAP.

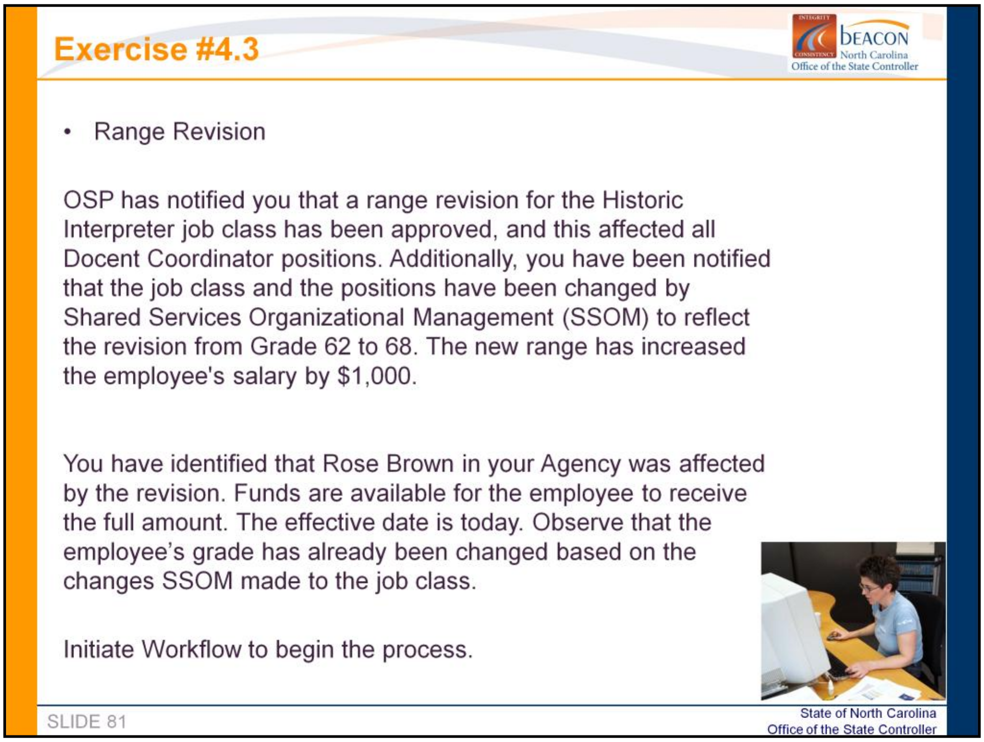
NOTE: A change in the Job will automatically change the salary range of all Positions that are within that Job (Class).

After the Job has been updated, HR must identify the employees who are affected by the change and then initiate a Range Revision via Workflow for each employee. If funding is available, the applicable reason and salary changes are made and the Action is completed. However, if funding is not available, HR still initiates the Range Revision Action, but chooses *No Salary Adjustment* as the reason. In this case, HR must then execute additional steps to ***reserve*** the balance. This latter type of Range Revision will be discussed further in a subsequent lesson.



Notes

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

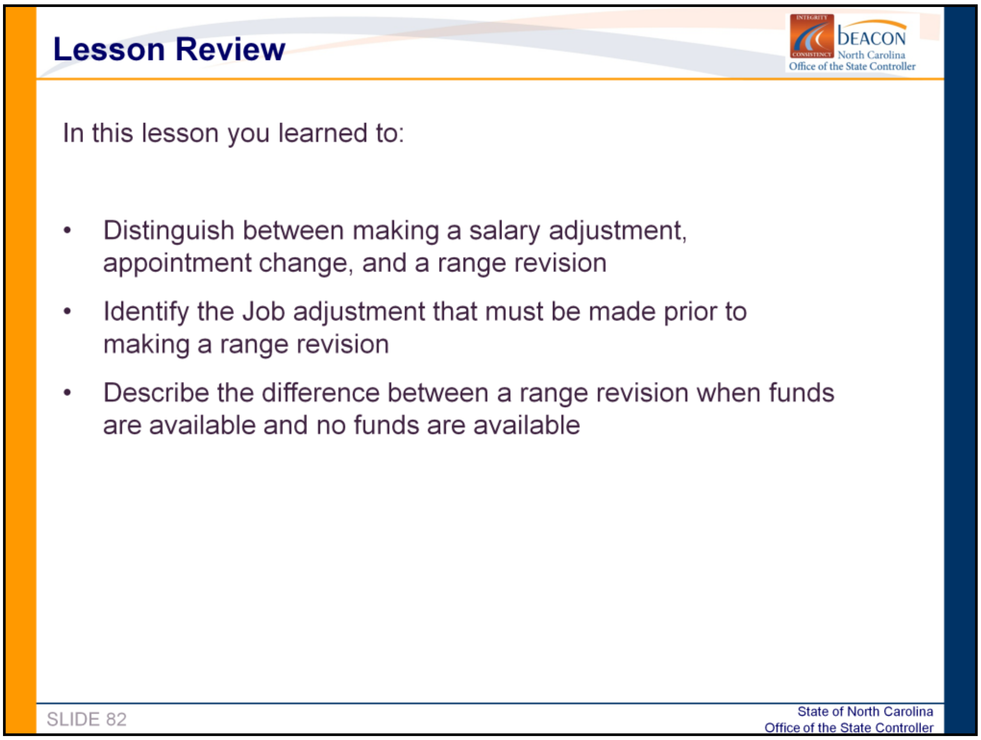


Notes

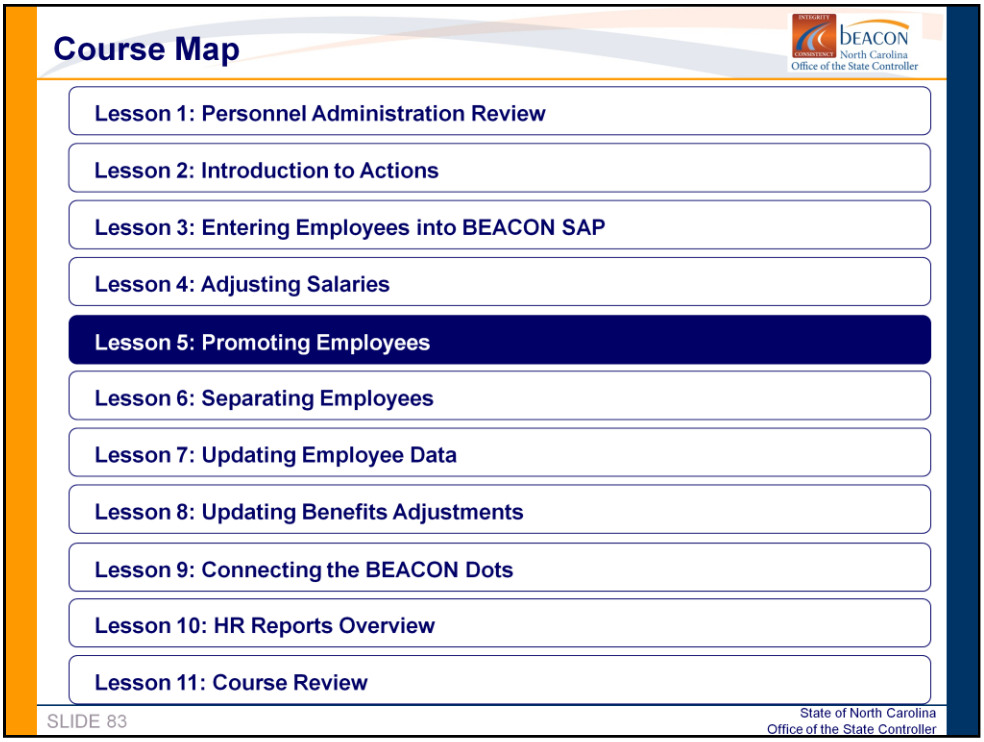
Before executing the Workflow PCR, verify the employee's current grade. Use transaction code PA20 to view the Basic Pay (0008) infotype. The current grade should be 62.

When processing the Range Revision Action, observe on the PCR that the employee's grade has already been changed. That change is a result of the Job change made by BEST Shared Services, Organization Management (SSOM). <u>Before</u> initiating a Range Revision, make sure that SSOM has made the appropriate OM changes. <u>This is critical!</u>

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Distinguish between making a salary adjustment, appointment change, and a range revision
• Identify the Job adjustment that must be made prior to making a range revision
• Describe the difference between a range revision when funds are available and no funds are available
SLIDE 82
State of North Carolina
Office of the State Controller

Notes


Course Map
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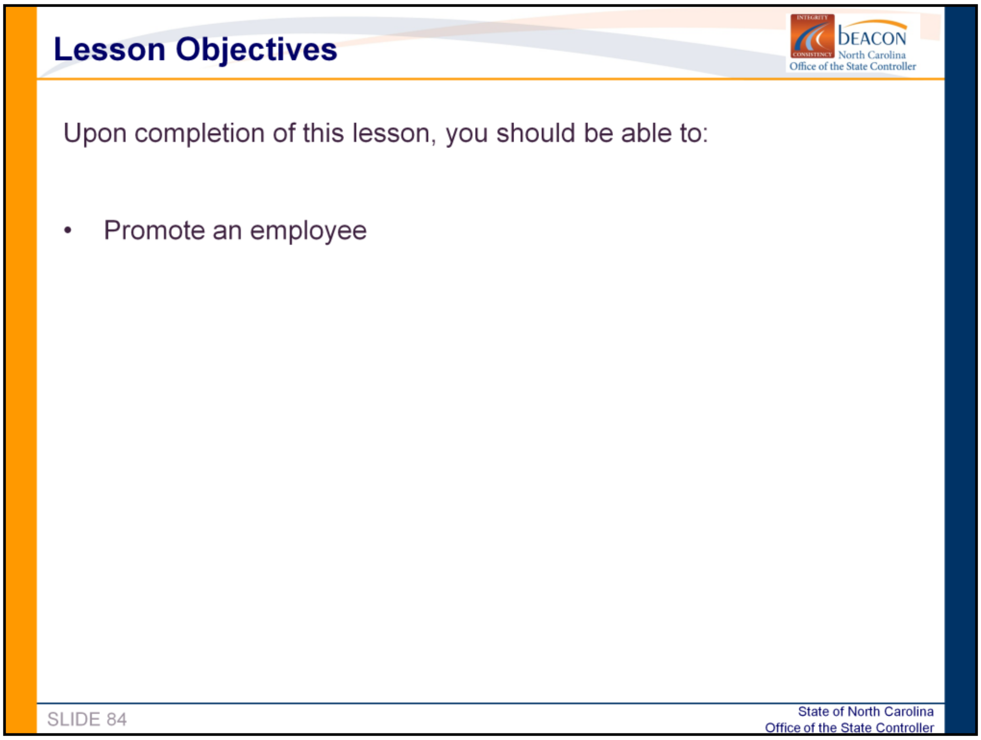
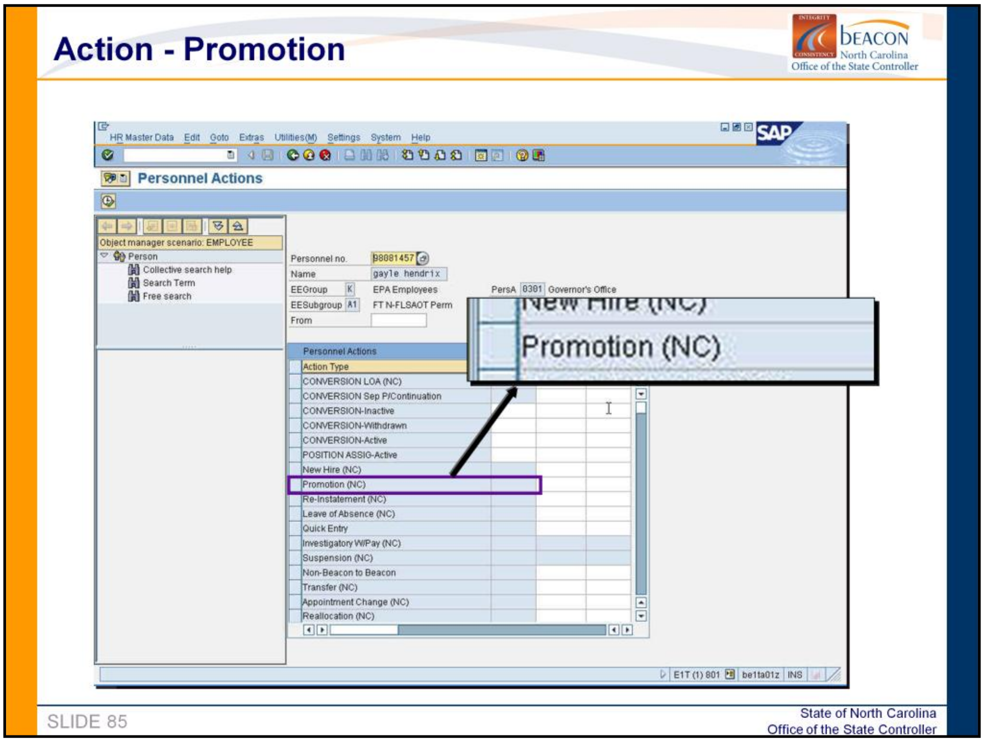
State of North Carolina
Office of the State Controller

Notes

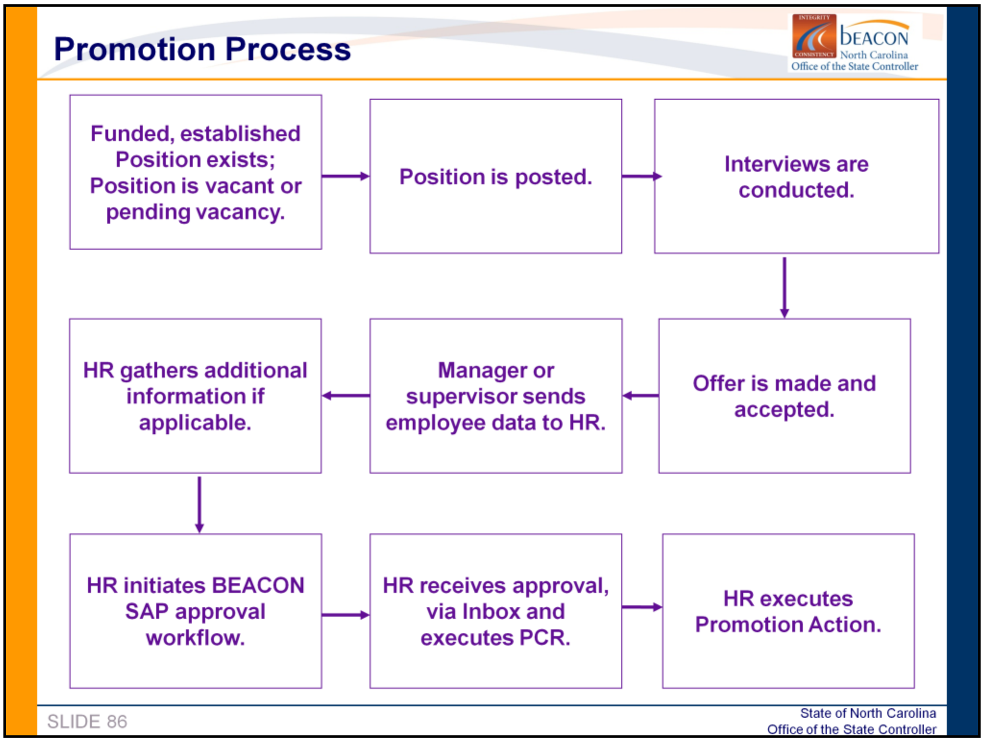

Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Promote an employee
SLIDE 84
State of North Carolina
Office of the State Controller

Notes



Notes

A **Promotion** is a change in status to a higher salary grade Position. A promotion also results in an increase in salary, in accordance with the State Promotion Policy.



Notes

Several steps must take place before a Promotion Action is executed in BEACON SAP.

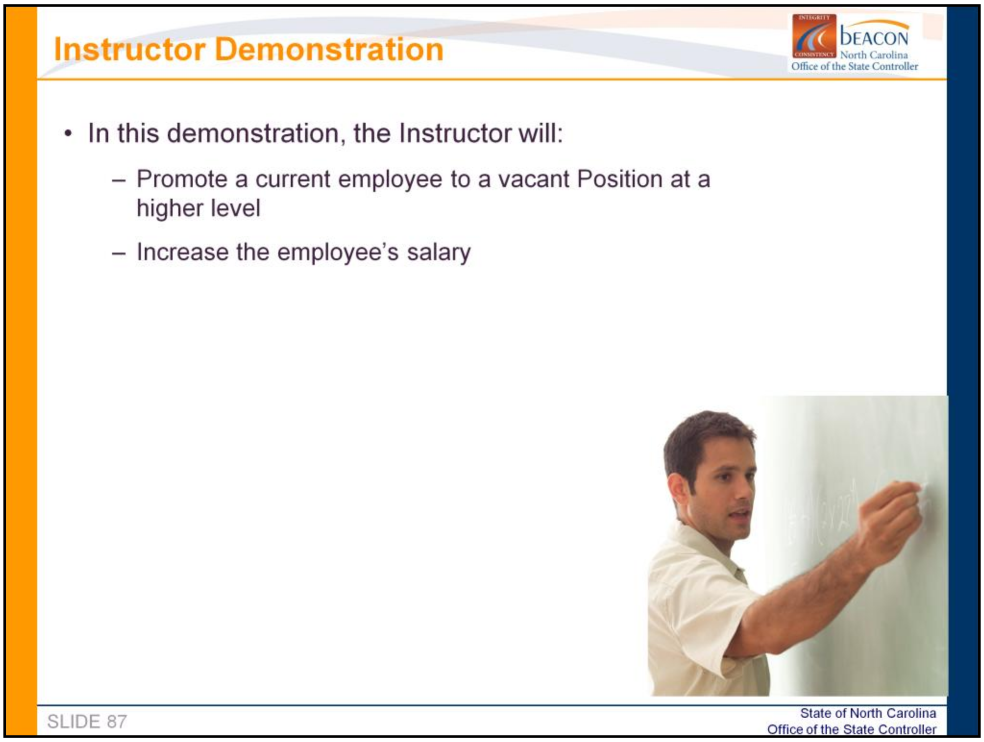
First, a funded and established Position must exist. The Position is either vacant, or there is official notification that a vacancy is pending (for example, an employee has submitted his or her resignation).

The Position must be posted in accordance with State policy. After the posting time frame has expired, all qualified candidates are interviewed and a qualified candidate is selected. After the candidate receives and accepts the promotion offer, the Manager or Supervisor sends the employee information to HR, using a variety of distribution methods (i.e. manual form, email, phone call, fax, or other method).

HR gathers any additional information and initiates the BEACON SAP approval workflow. After the approval is received via Inbox, HR executes the PCR and the Promotion Action.

Reasons for Promotion

- Promotion
- Promotion Inc-After Eff Date
- Acting Promotion



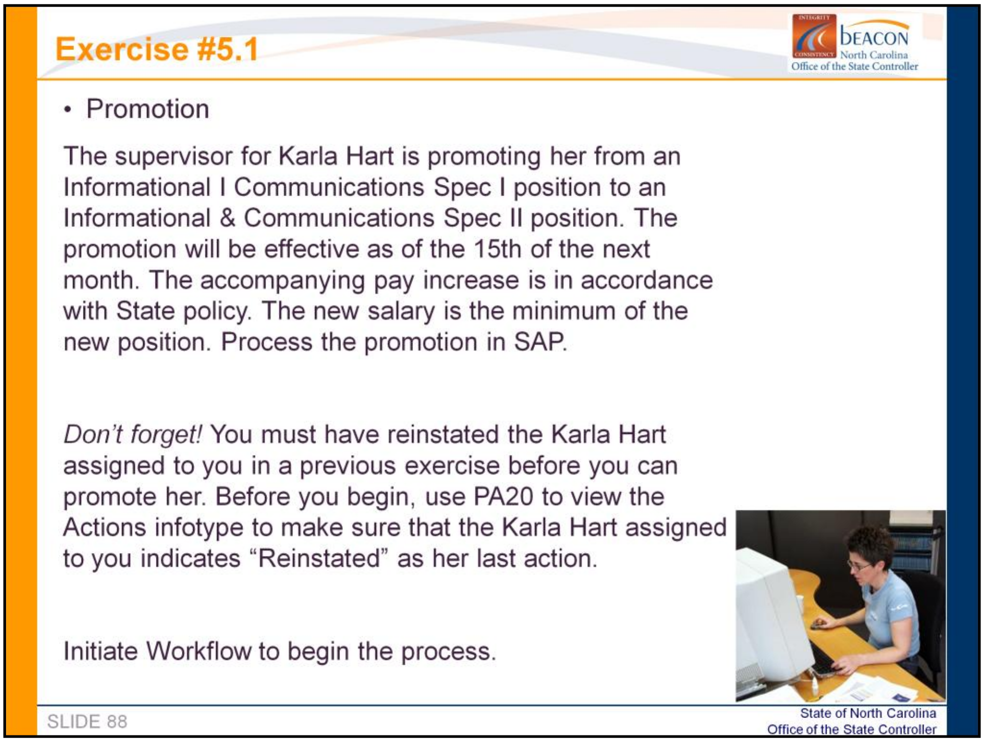
Notes

During the Promotion Action process, BEACON SAP prompts you to select the following:

- Create a vacancy for the Position the employee held prior to being promoted. Select **Yes**.
- Delimit the vacancy on the Position to which you are promoting the employee. Select **Yes**.

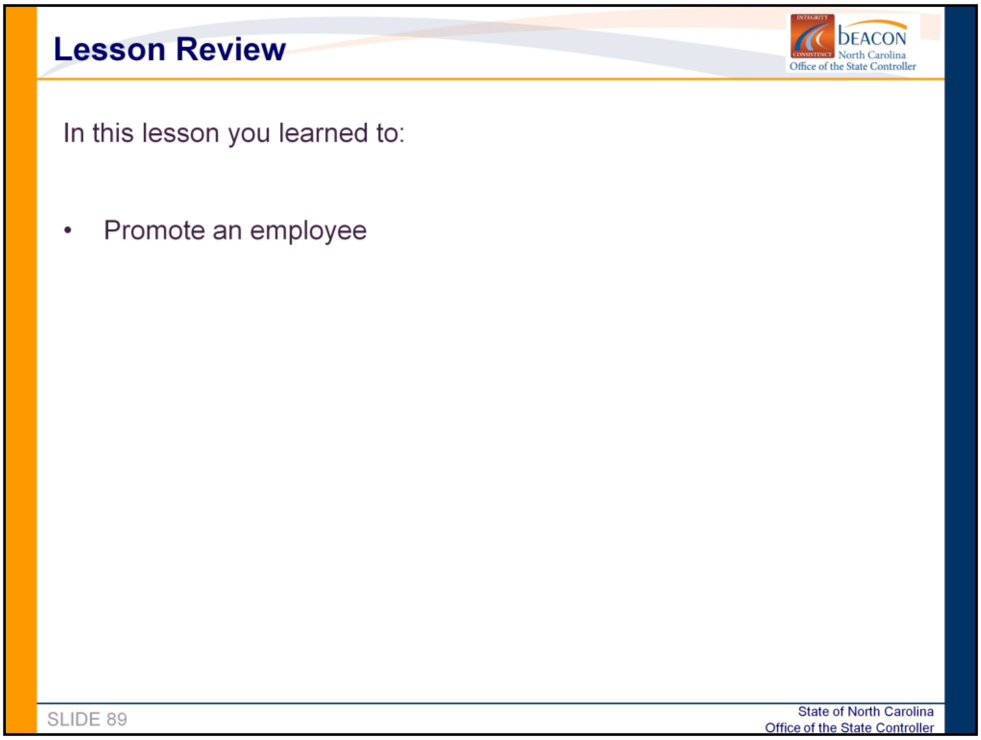
You should also be aware that the work schedule will default from the Position. You should change the work schedule based on the approved schedule *if* it is different from the one listed. The default work schedule is based on information provided by your Agency and by BEACON team members. It is important to review this work schedule for correctness, including the working hours.

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.



Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Promote an employee
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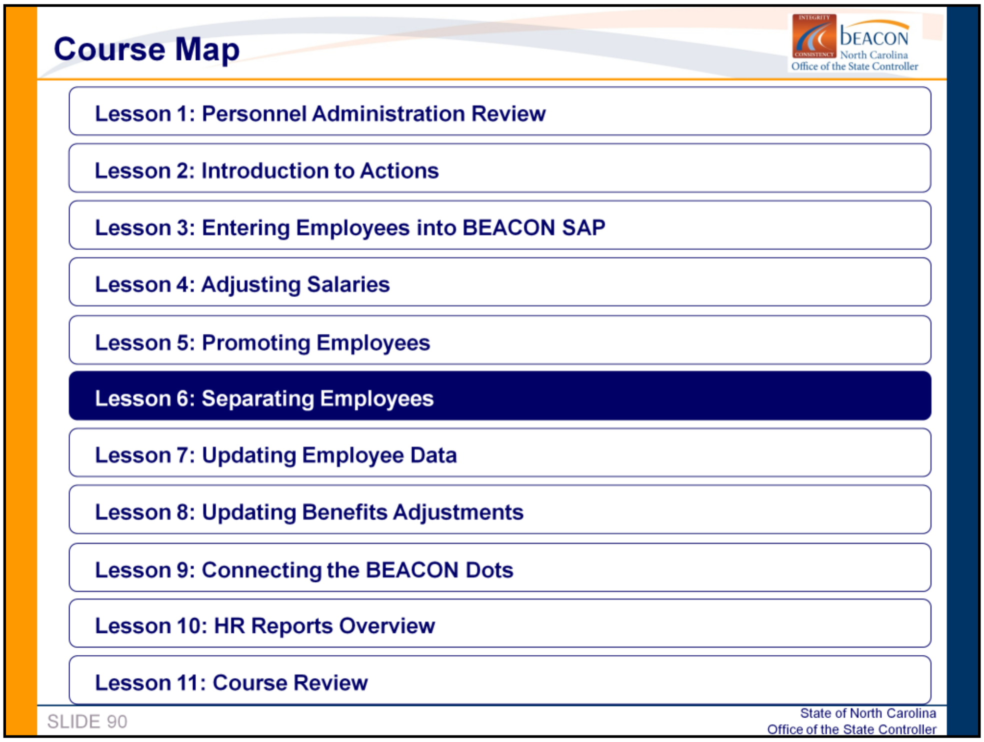
State of North Carolina
Office of the State Controller

Notes


Course Map
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Lesson 10: HR Reports Overview
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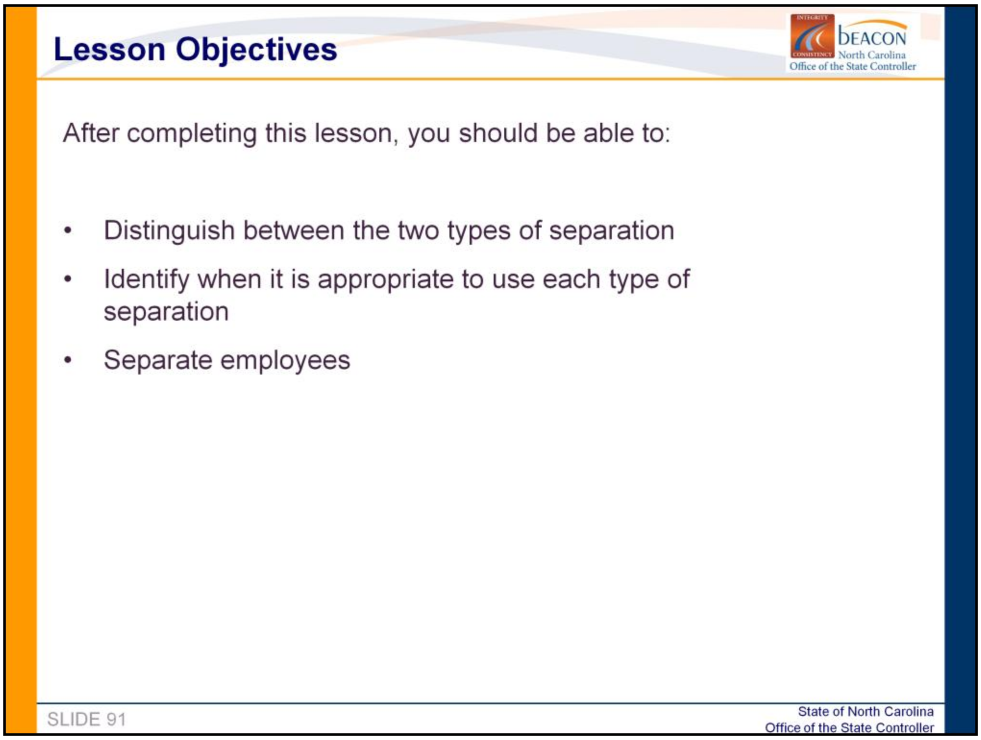
Notes


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
After completing this lesson, you should be able to:
• Distinguish between the two types of separation
• Identify when it is appropriate to use each type of separation
• Separate employees
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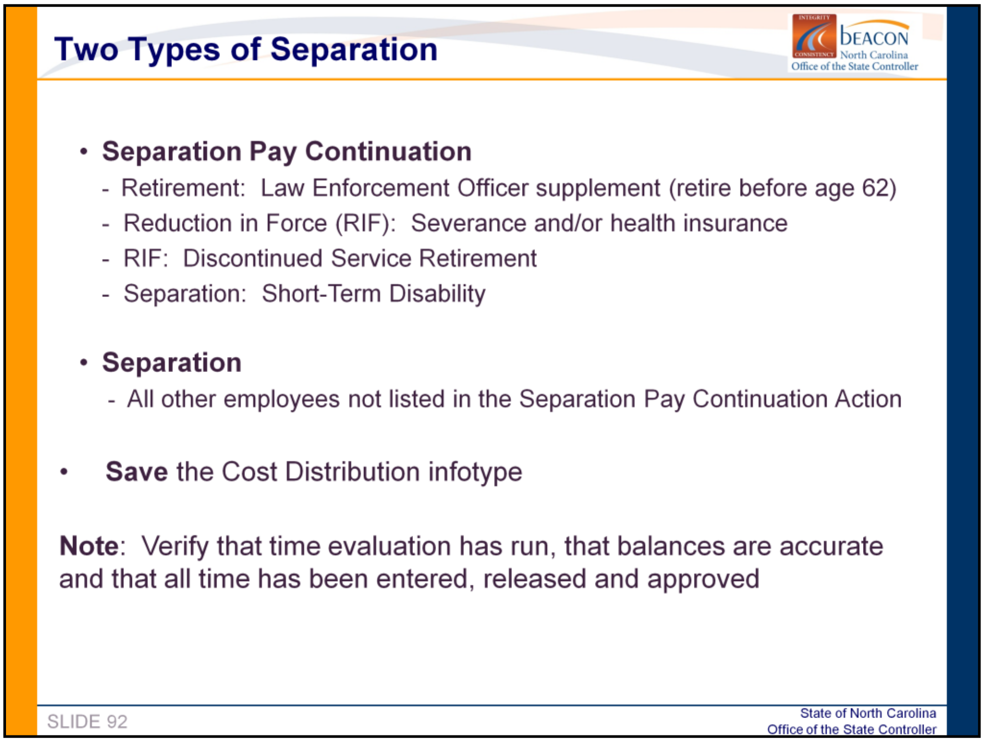
State of North Carolina
Office of the State Controller

Notes



Notes

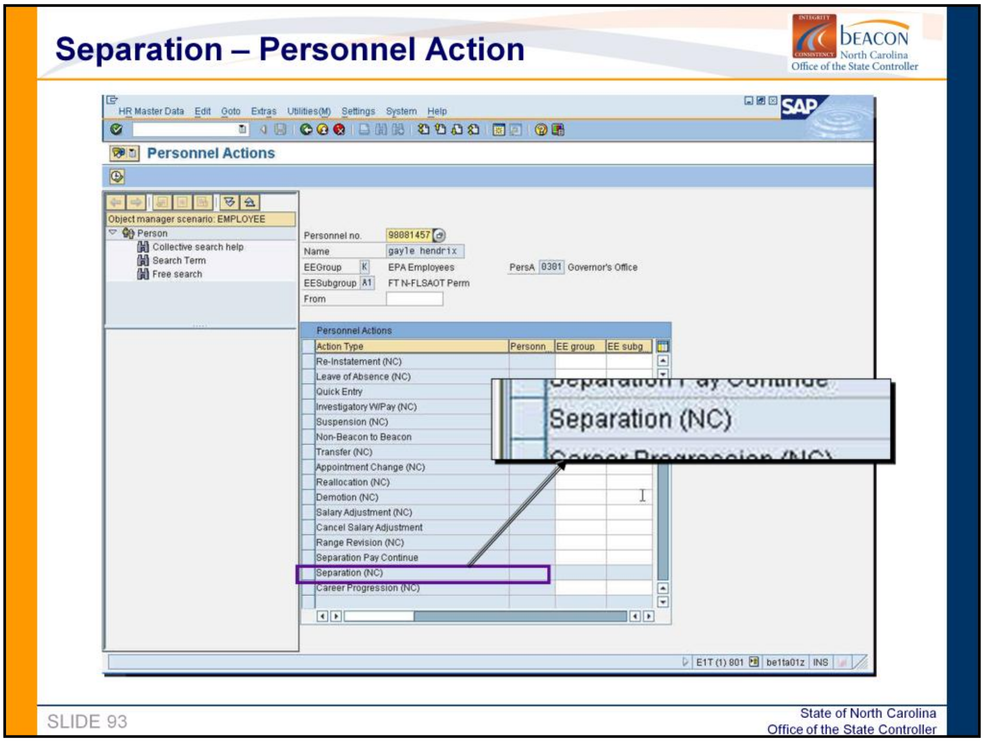
There are two Actions that involve employee separation, Separation Pay Continuation and Separation. It is important to determine which Separation Action is appropriate. Before you enter either type of separation, it is important to make sure that (1) time evaluation has been run (Hint: Use PA20 transaction to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run), and (2) time balances are accurate.

Separation with Pay Continuation is used only for:

- ***Retirement*** - Law Enforcement Supplement for Law Enforcement Officers (LEOs) who retire before age 62. You will use the other Separation after age 62.
- ***Reduction-in-Force (RIF)*** – Severance and/or health insurance
- ***RIF*** – Discontinued Service Retirement
- ***Separation Short-Term Disability***

Separation is used for all employees who do not qualify under the Separation with Pay Continuation Action.

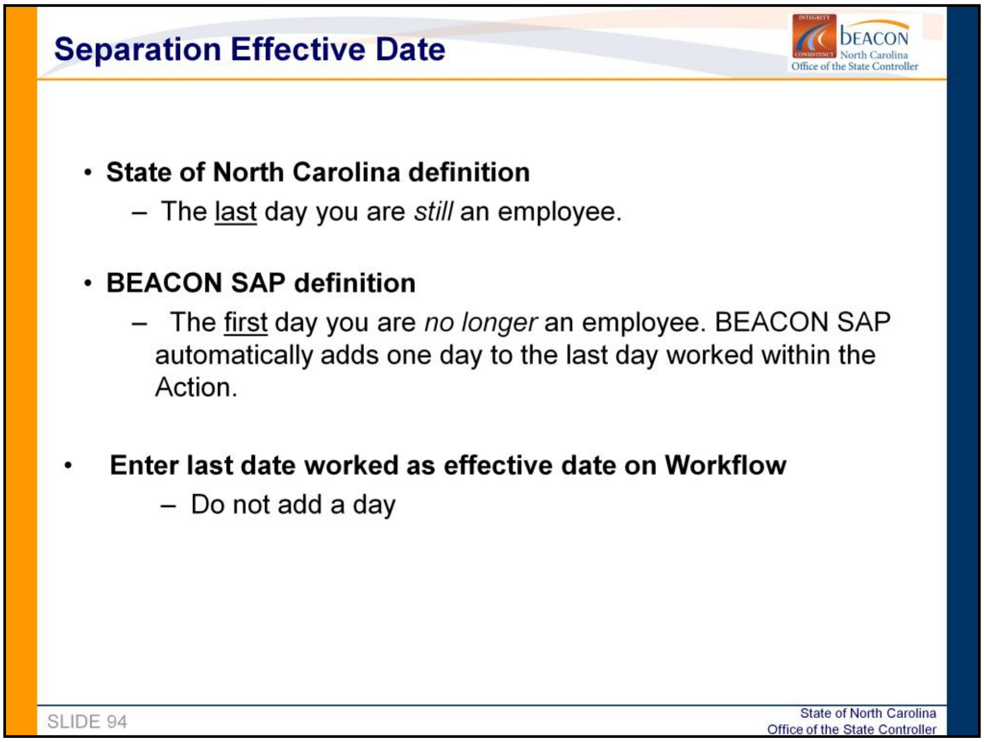
Cost Distribution Infotype (0027). This infotype is assigned to every position. When an employee is separated, his or her position defaults to 99999999; therefore no cost distribution is assigned. During both types of Separation, you **save** the infotype so that it is assigned to the person. This infotype allows you to create a payout to an employee if needed after the separation. If the Cost Distribution infotype has not been saved, the payout cannot be processed. If the employee returns to work later, you will **delimit** the infotype during the Reinstatement.



Notes

Before processing a Separation, you should ensure that all time sheets have been entered, approved and released. If the timesheets are not up-to-date, correct, approved, and released you cannot enter the payout of leave during the Separation Action. When this happens, you will complete the Separation by-passing the leave payout infotype. When the timesheet has been run and released, you will use PA30 to create *Time Quota Compensation* (0416) to payout the employee's applicable leave.

NOTE: The Separation Action automatically converts the direct deposit to a check. It is important to ensure that the address is correct prior to entering the Separation into BEACON SAP.



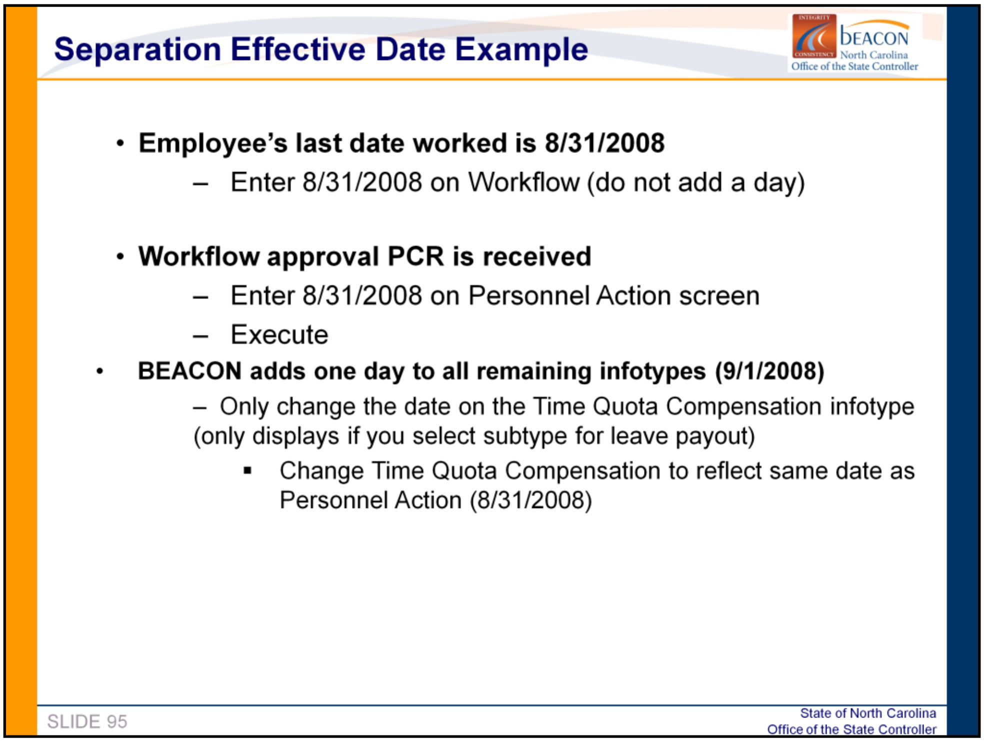
Notes

Separation effective date

The State of North Carolina defines your effective separation date as the last day you are *still* an employee. BEACON SAP defines it as the first day you are *no longer* an employee.

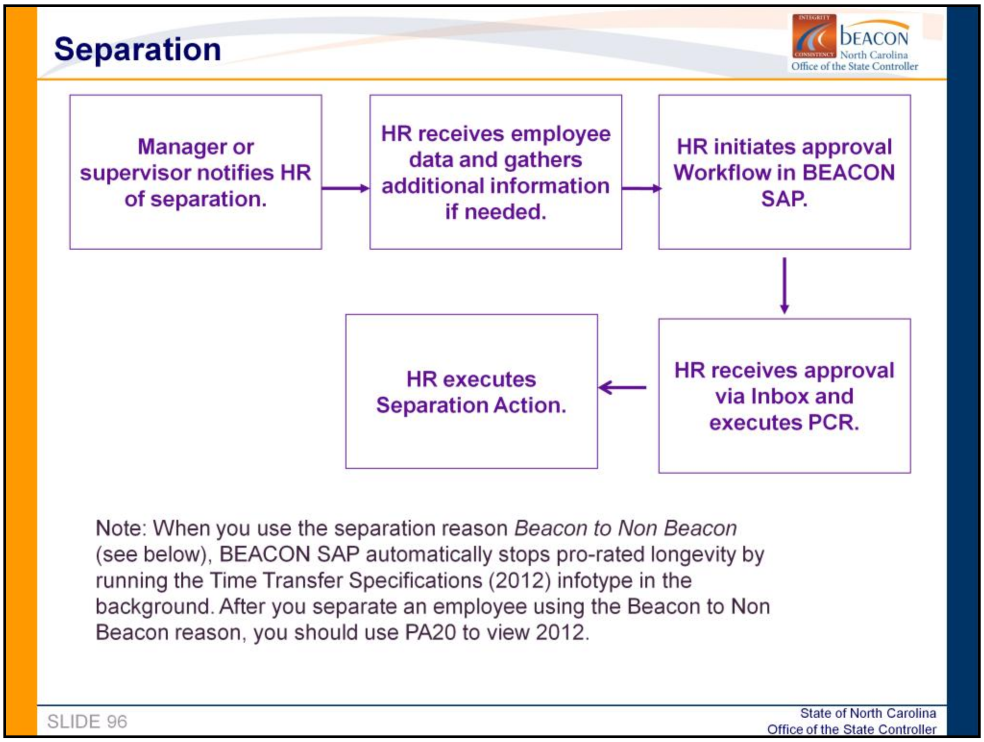
On the Workflow (WF) Employee Action Request, enter the last day worked (or on payroll if retiree)--do not add a day. BEACON SAP automatically adds one day to the last day worked within the Action. Examples: The employee is separating for personal reasons and the last day worked is 8/25/2008. The effective date is 8/25/2008. Or, the employee is retiring effective 9/1/2008. The employee's last day worked is 8/28/2008, because he or she is exhausting vacation the remainder of the month. The effective date will be 8/31/2008. The last day worked would be 8/28/2008.

After you receive the WF approval PCR, enter the last day worked as the effective date on the Personnel Actions screen in BEACON. Beginning with the next screen, *0000-Copy Actions*, BEACON has already added one day to the date you entered on all subsequent infotypes within the Action. Save the infotypes and **do not** change the dates **until** you get to infotype *0416-Create Time Quota Compensation* (you only receive this infotype if you have leave payout). **Change** the date on that **one** infotype (0416) to reflect the same date as the effective date of the Action. **If you change the dates on any infotype except 0416, the employee will not receive the last day of pay. See example on the next page.**



Notes

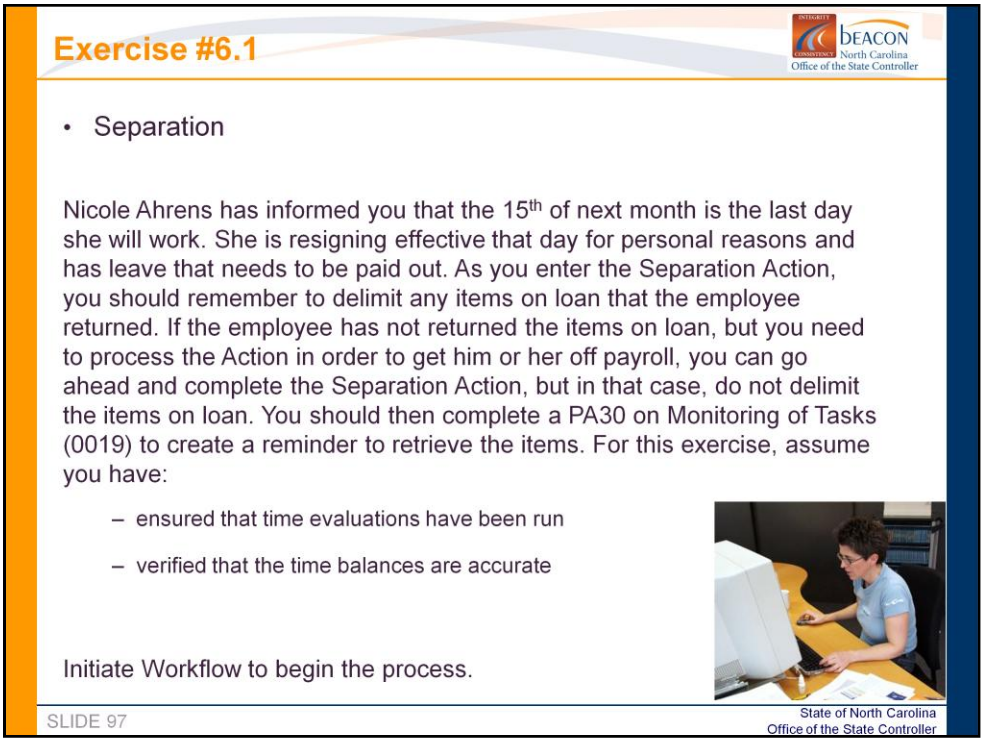
1. Last date worked is 8/31/2008, which is entered on the WF Employee Action Request. Be sure to enter the same date in “Last Day Worked” (see previous page if retiree).
2. After receiving the WF approval, enter 8/31/2008 on the Personnel Actions Screen (PA) and Execute.
3. Copy Actions (0000) is displayed with a date of 9/1/2008. **Do not change** the date. Enter the reason for the Action. If Separation Pay Continuation, change the position number to 99999999. **Save** the infotype.
4. Enter to by-pass the delimit message, and click **Yes** to create vacancy.
5. Copy Organizational Assignment (0001) is displayed. **Do not change** the date. **Save** the infotype.
6. Change Date Specifications (0041) is displayed. **Do not change** the date. **Verify** the last day worked is accurate. **Save** the infotype.
7. Create Cost Distributions (0027) is displayed. **Do not change** the date. **Save** the infotype.
8. Infotypes for infotype Time Quota Compensation is displayed. Perform either (a) or (b) as described below:
   (a) If no payout, close the pop-up.
   (b) If payout, **Select** the appropriate subtype. Time Quota Compensation is displayed. **Change the date** to reflect the same date as the effective date of the Action (in our example, 8/31/2008). **Enter** the number of hours of payout. **Save.**
9. Delimit Objects on Loan (0040). **Do not change** the date. **Delimit the applicable items** and **Save** the infotype.
10. Click the Back button when automatically returned to the PA screen.
11. Click the Complete Workflow Item button.



Reasons for Separation

- Better Employment
- Personal Reasons
- Involuntary Separation
- Did Not Report
- Voluntary Resigned Without Notice
- Reduction in Force (RIF)
- No Reason Given
- Long Term Disability
- Retirement
- Retirement Disability
- Contract Ended
- Time-Limited Appt Term
- Supplemental Appt Term
- Appointment Ended
- Not Re-Elected
- Dismissed – Gross Inefficiency
- Dismissed – Conduct
- Dismissed – Unsatisfactory Performance
- RIF – Prior to achieving career status
- Prior to achieving perm status
- Pay in lieu of notice
- Death
- Other
- Terminate while on FMLA
- Cancel Sep Pay Continuation
- Beacon to Non-Beacon Agency (pro-rate longevity will not be paid—see note on slide above)

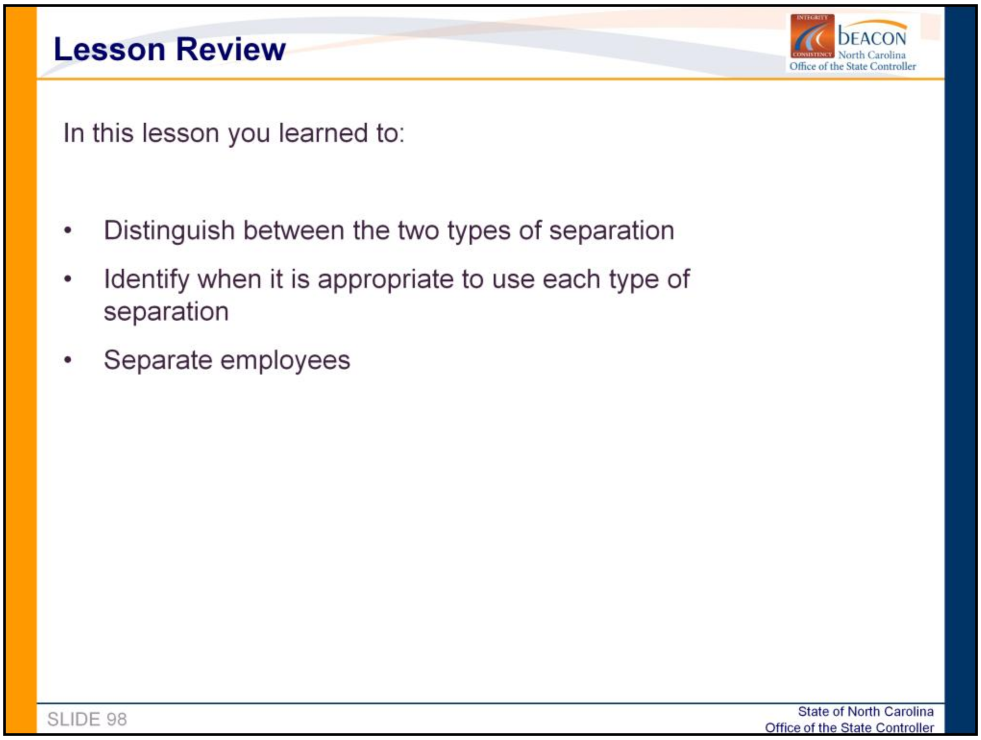
<u>Notes</u>



Notes

Use the data in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

NOTE: If the employee has not returned the items on loan you will not delimit those items, but you should make an entry in PA30 on **Monitoring of Tasks** to enter a reminder to follow up and retrieve items.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Distinguish between the two types of separation
• Identify when it is appropriate to use each type of separation
• Separate employees
SLIDE 98
State of North Carolina
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Notes


Course Map
BEACON North Carolina Office of the State Controller
Lesson 1: Personnel Administration Review
Lesson 2: Introduction to Actions
Lesson 3: Entering Employees into BEACON SAP
Lesson 4: Adjusting Salaries
Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
SLIDE 99
State of North Carolina
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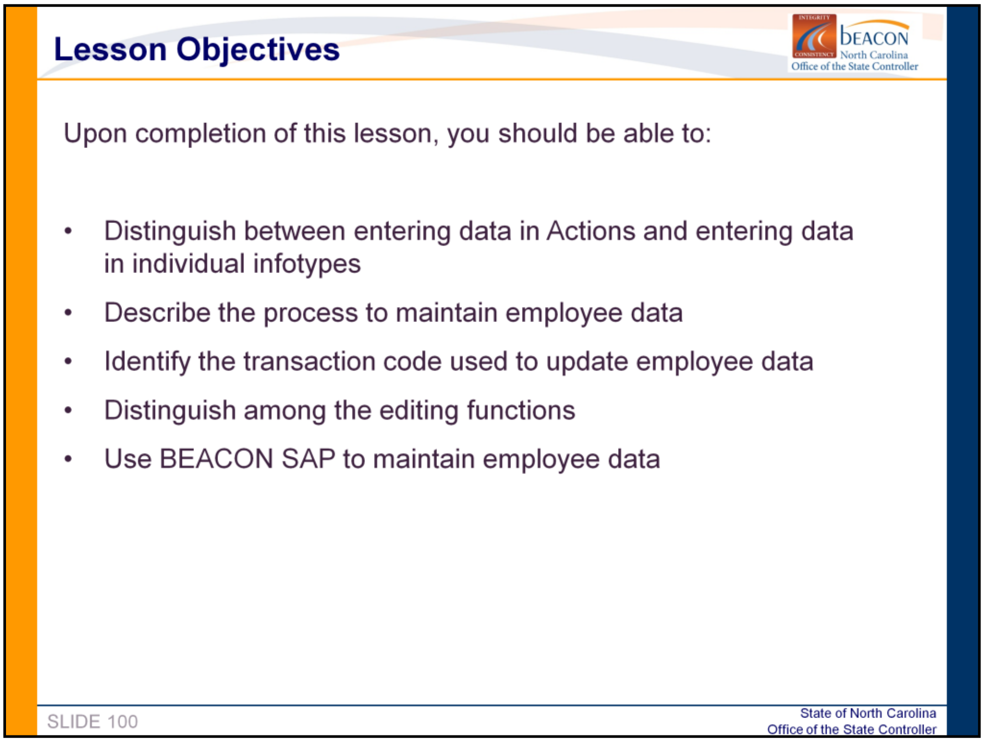
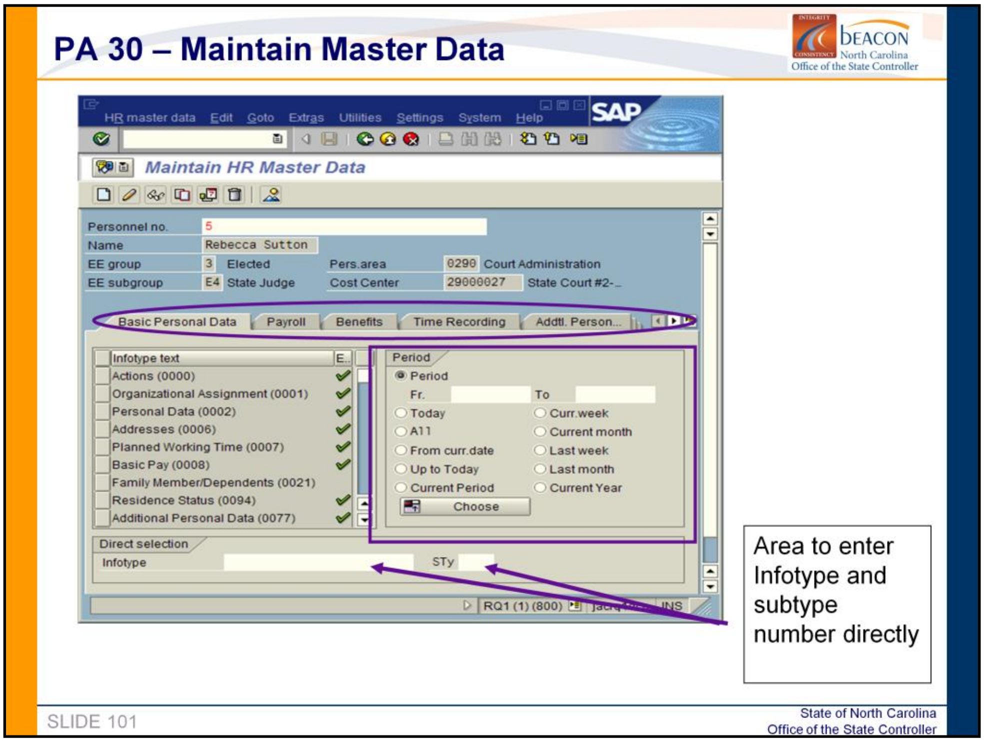
Notes



Notes

In the previous lessons you entered data into an employee's personnel file by using Actions. By using Actions, BEACON SAP automatically presented you with a series of logically arranged infotypes that together comprised the employee's records that could change with the Action.

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised, rather than BEACON SAP automatically presenting the infotypes to you. Although Workflow is not required for maintaining employee data, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.



Notes

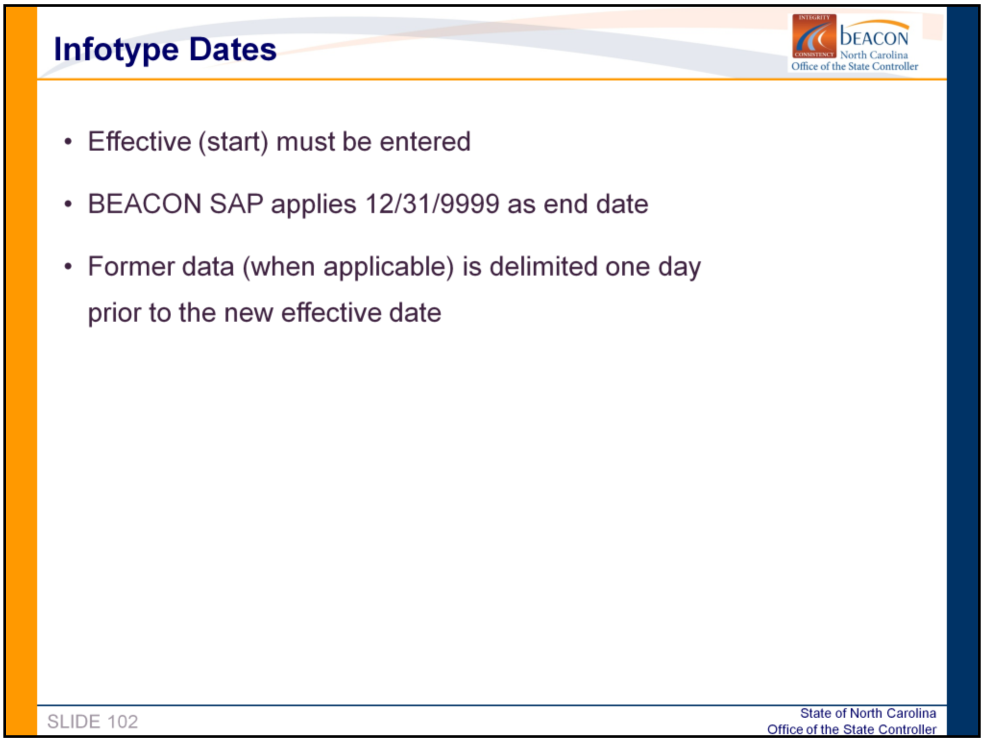
After employees are hired, circumstances may arise that make it necessary to enter new data or revise existing data.

Use **PA30** to access the Maintain HR Master Data screen. There are several options available, which are the same options you saw in **PA20**-Display Master Data. The options are:

Tabs: The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access, or use the display all tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.

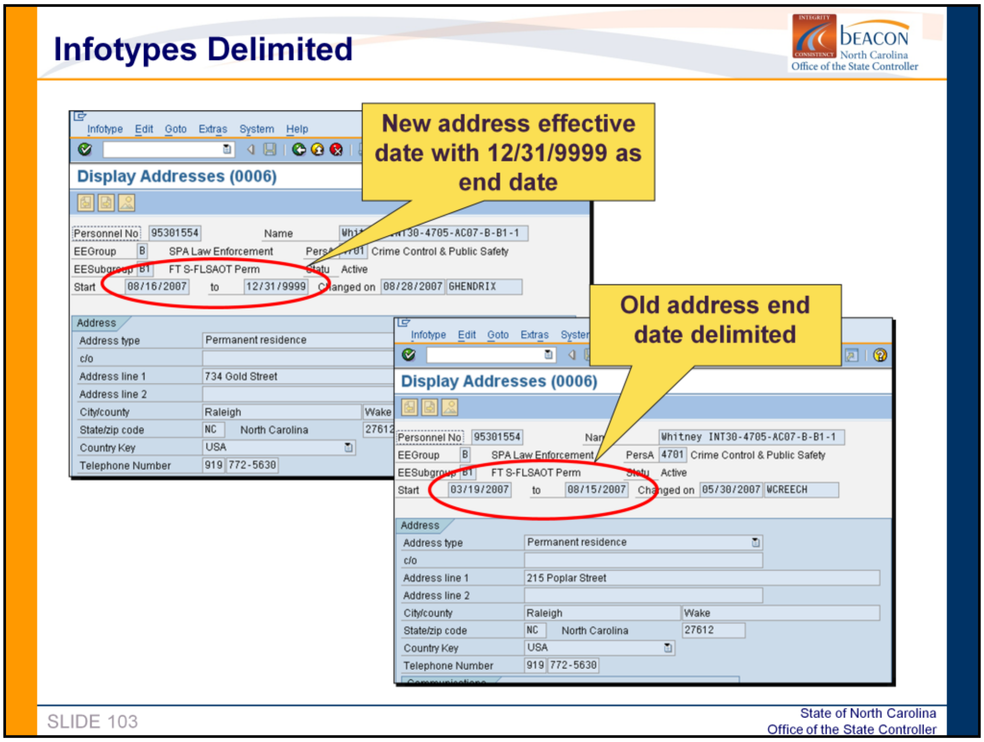
Period: You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will display only if the All option has been selected.

Direct Selection: You can either enter the infotype code and subtype in the Direct Selection field, or use the matchcode to search for the infotype. You don't have to be on a specific tab to use the Direct Selection option.



Notes

The same rules that apply to dates in Actions are also applicable when creating or revising infotypes. Each entry must have an effective date and an ending date. In most cases you will not enter an end date; BEACON SAP will automatically apply the end of time for the new data. In addition, BEACON SAP automatically delimits the previous infotype to one day prior to the new data.

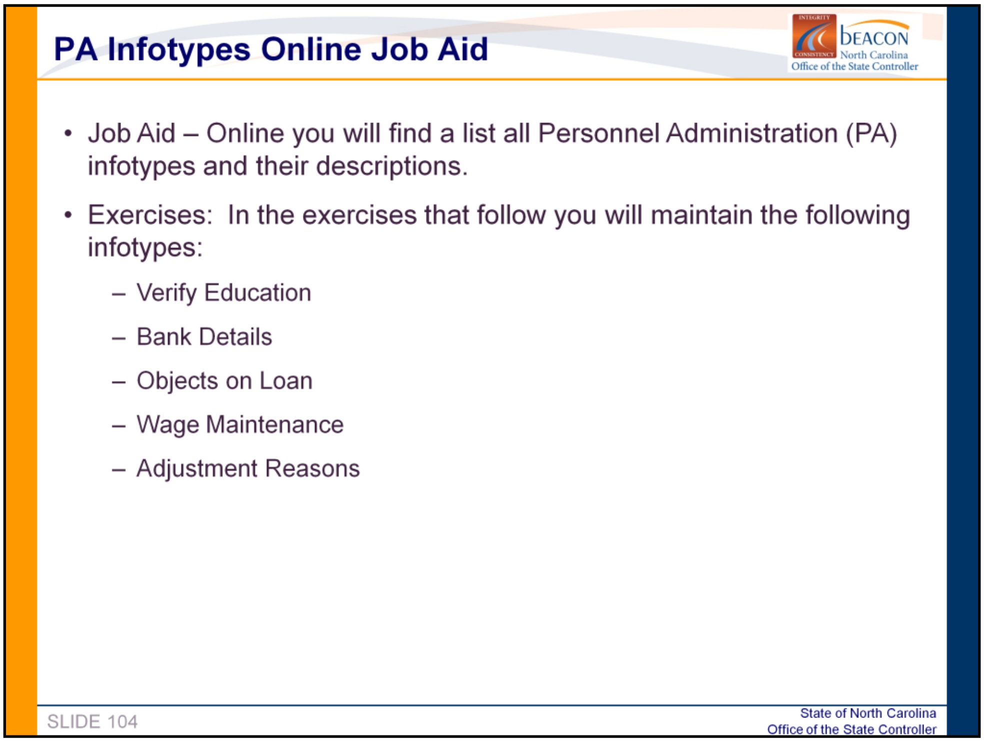


Notes

In the above example, the employee moved to a new permanent address effective 8/16/2007. When the new permanent address was entered with the 8/16/2007 effective date, BEACON SAP automatically assigned the end date as 12/31/9999 and delimited the old permanent address to 8/15/2007.

The employee's other addresses, emergency contact and mailing address, still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: The Emergency subtype is an exception to the automatic delimit rule. BEACON assumes an employee may have more than one emergency contact; therefore the previous emergency record is not automatically delimited. You must manually delimit the previous emergency record if it is no longer applicable.



Notes

The *PA Infotypes* job aid is available online. The job aid contains a complete list of all the infotypes used in Personnel Administration, including codes and brief descriptions.

In this class, you will have an opportunity to maintain several infotypes. After you learn to maintain one infotype, you will realize that you use the <u>same</u> process and methodology to maintain any infotype.

Discuss with the Instructor any questions you have about infotypes and their descriptions.

A condensed version of the job aid is available as a handy job aid for use at your work station. The condensed version is also available online.

Maintain HR Master Data

Maintaining HR Master Data records involves processing existing HR master data records by one of the following functions:

- Creating new data
- Changing existing data
- Delimiting existing data
- Deleting data (only used by HR!)
- Copying data (to maintain history)

Access is determined by BEACON SAP security and your HR BEACON roles

Employees with access to Employee Self-Service can make certain changes to their employee records

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State of North Carolina
Office of the State Controller

Notes

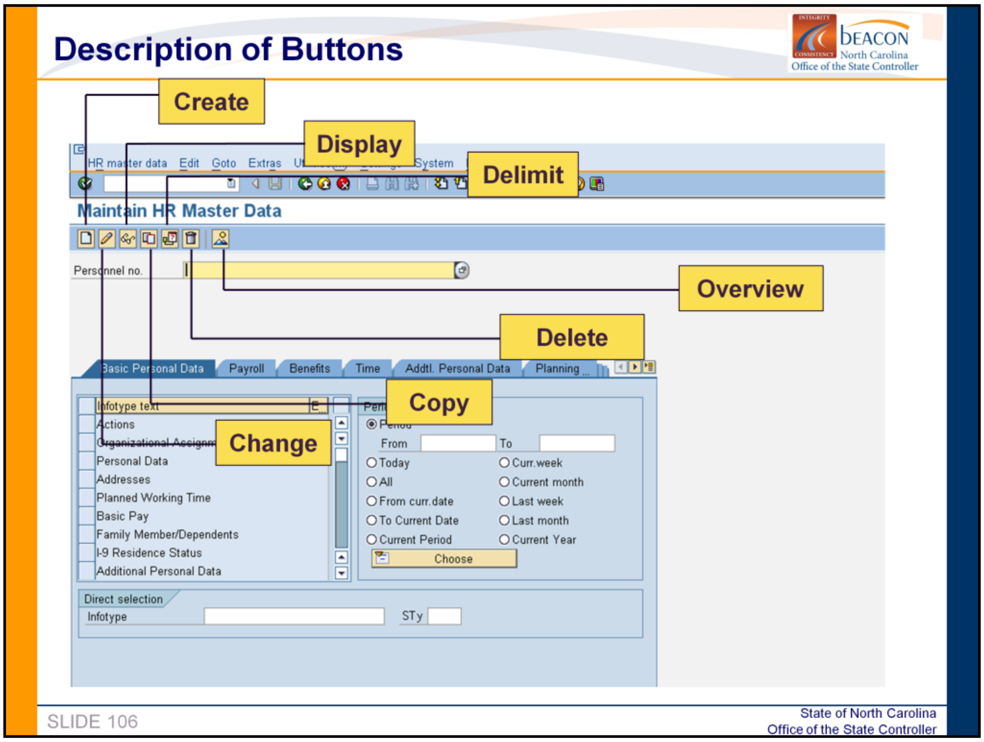
Using **PA30 – Maintain Master Data**, allows you to use the various functions to create, correct, copy, change, and delete information, or enter a stop date on a specific infotype.

As indicated in the BEACON SAP Navigation course, screens and tasks to which you have access are determined by your BEACON SAP security role. Only certain business roles will have the security access to maintain master data records for the employees in your Agency.

Some personnel information can be changed by the employee through Employee Self-Service (ESS), including:

- Tax Withholding
- Addresses
- Family Member/Dependents
- Bank Information

However, in order to provide you an opportunity to practice, the exercises in the training are designed to assume the employees do not have access to ESS.



Notes

There are several ways to Maintain Master Data as listed below. You may not have security access to all of the options.

Create: Create a new infotype for an existing employee.

Change: **Do not use!** A decision has been made that State HR will use the Copy function with the original date to overwrite existing data and correct data. You will not use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

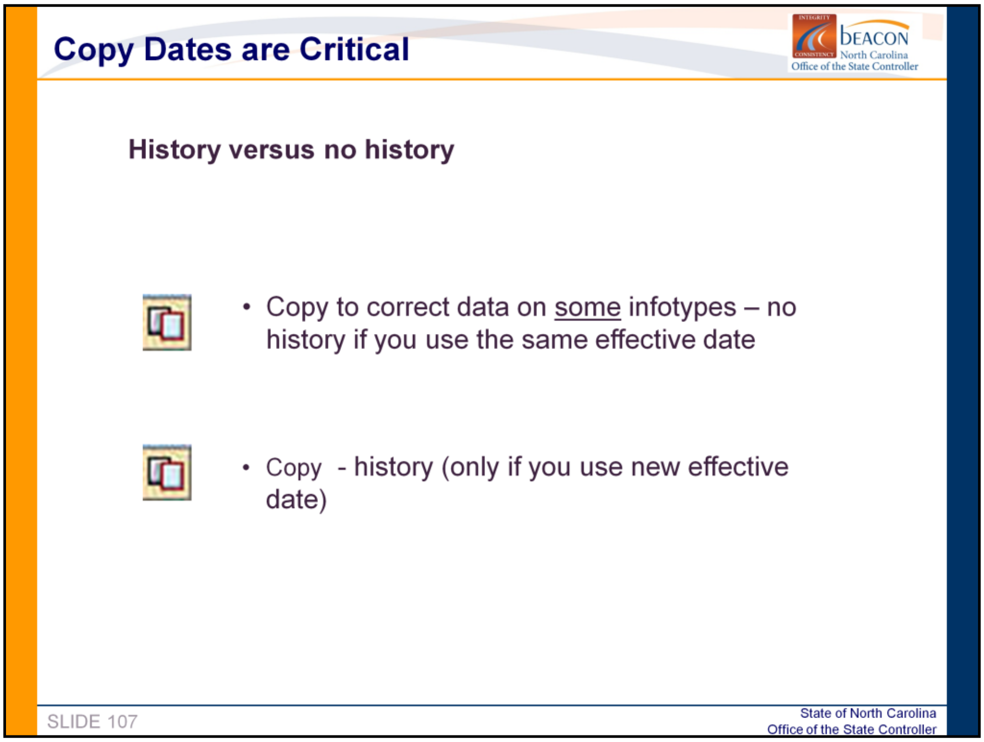
Delete: Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved. Only a select number of HR employees will have security access to use the Delete function.

Delimit: Enter an end date on an infotype to make it inactive.

Copy: Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you don't use a new effective date, you are overwriting history on some infotypes. You must ensure that you use the new effective date when you use this function.

Display: View an individual infotype.

Overview: View a list or summary of the infotype's data.



Notes

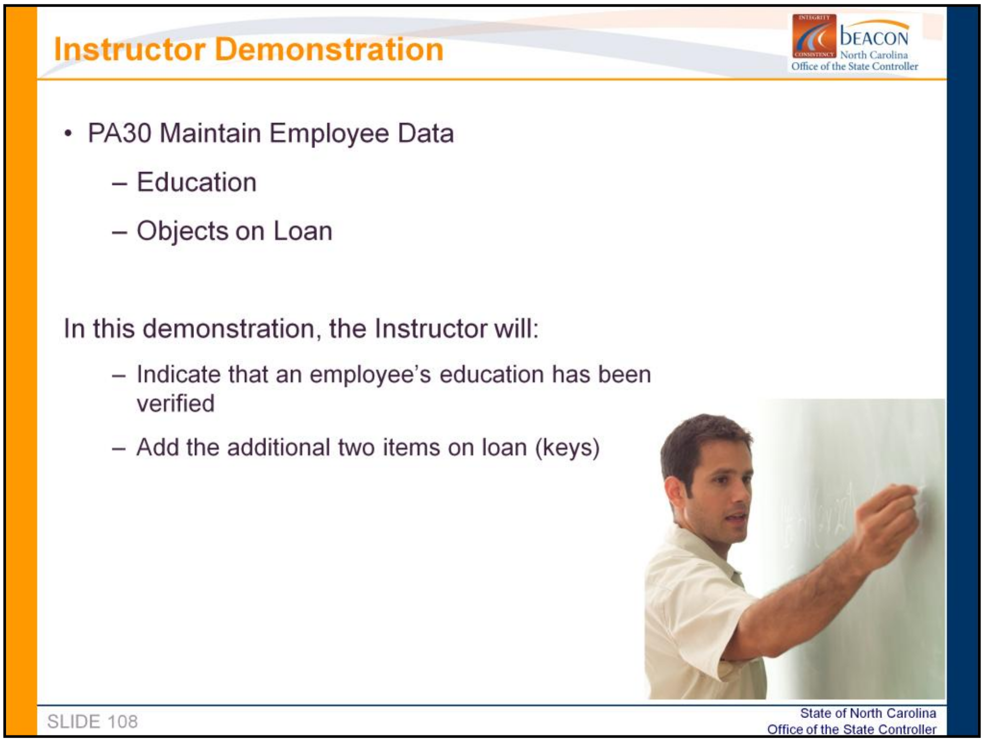
There is an important distinction between using the Copy function with the original date and with a new effective date:

- Use the original date when you need to correct an error on existing infotypes. By using the infotype's original date, you are overwriting the history. Be aware that you can only use the Copy function to correct errors on some infotypes. For others, you will have to contact BEST.
- Use a new effective date when you want to create history.

The original date is used to correct data errors. Using this function overwrites the existing data; therefore, there is no history of the former erroneous data. For example, if the person's last name was entered incorrectly, you would not want the incorrect spelling on the employee's record. Using Copy function with the original date in this instance is appropriate so the correct last name is displayed in the employee's record.

You must be extremely careful about the date when using the Copy function. For example, an employee has bank "A", and wants to change to bank "B" the first of next month. If you use the Copy function with the new date (the first of next month), there is a history of both banks. On the other hand, if you used Copy and forgot to put in the new date, it would look as if the employee had always used bank "B"; there would be no history of bank "A". Remember, using Copy with the original date, there is no history.

NOTE: You can only Copy current records. Keep in mind all history changes must be sent to BEST Shared Services to be changed. This is the same as you did in PMIS with prior forms to OSP for approval/entry.



Notes

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #7.1

BEACON North Carolina Office of the State Controller

- PA 30 – Maintain HR Master Data – Verify Education and Objects on Loan

Assume it is the first day of next month. You have received verification of the education for the first employee that you hired (Exercise 3.1).

Enter the verification on the employee's record.

You realize you forgot to add the two keys that the employee received when hired. Add those items now.

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State of North Carolina Office of the State Controller

Notes

Caution! In this exercise, you will be using two different effective dates.

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Exercise #7.2

- PA30 Maintain Employee Data – Maintain Bank Details

Karla Hart has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

Update the employee's BEACON SAP record to reflect the change to the banking information. Her new bank is Capital. The bank key is 053112123. Her checking account number is 84568; savings is 684511.

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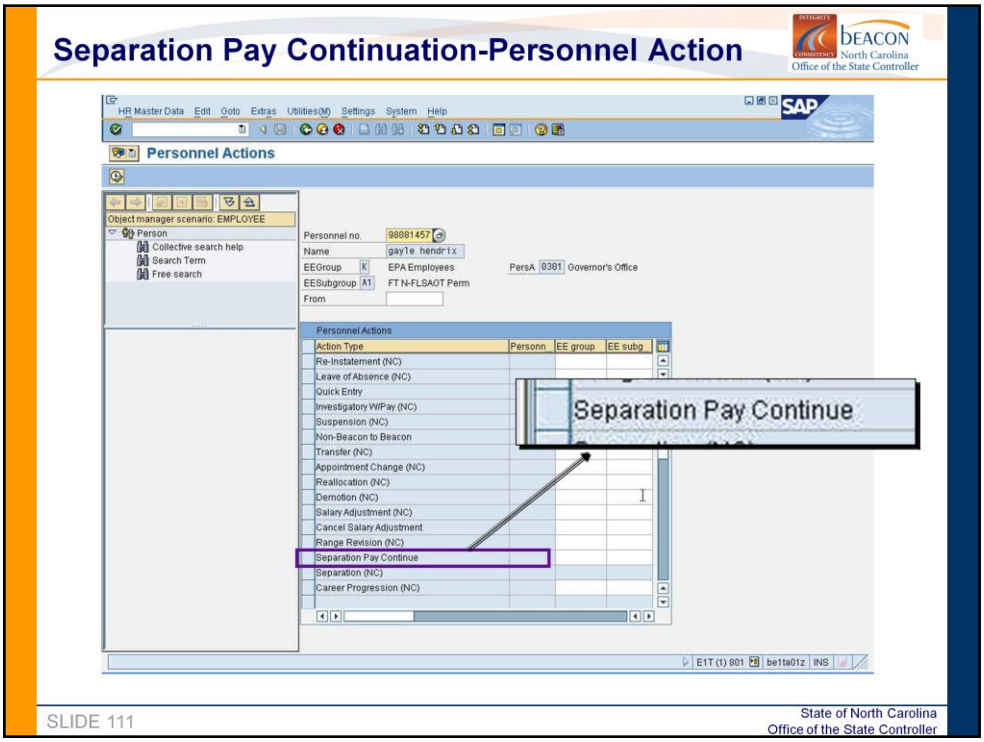
State of North Carolina
Office of the State Controller

Notes

If an employee wants to close an account and move to a new account, you should advise the employee to leave the old bank account open until the direct deposit has correctly been made to the new bank or the new account.

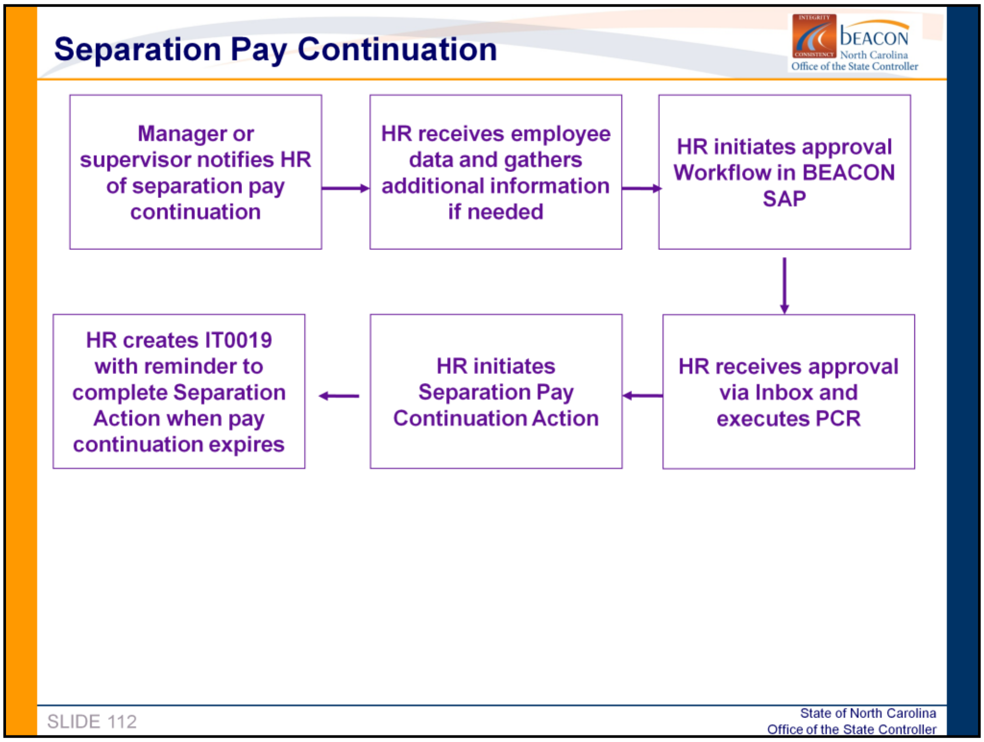
Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.



Notes

Important! When Separation Pay Continuation is used, the pay continuation is for a specified time frame; therefore, eventually, a "regular" Separation Action must be performed at that time.

In the next two exercises, you will process an Action combined with a PA30 – Maintain Employee Data.



Notes

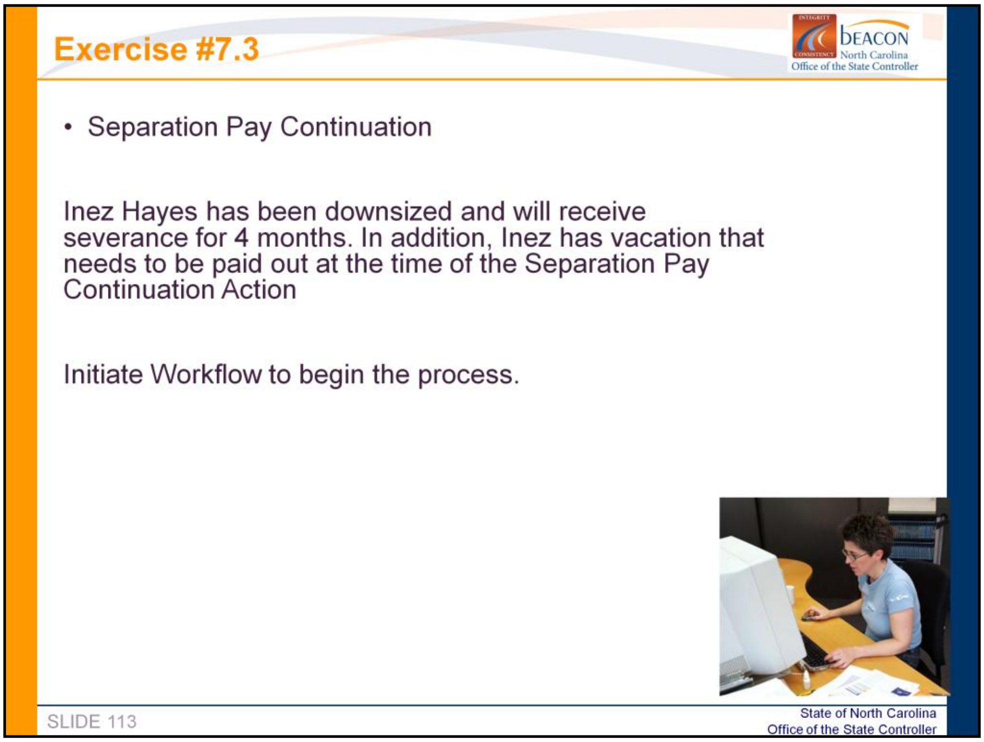
Reasons for Separation Pay Continuation Action

- Retirement (Law Enforcement Supplement who retires prior to age 62) *
- Reduction in Force (RIF) – Severance and/or health insurance
- RIF – Discontinued Service Retirement
- Separation Short-Term Disability

Note: *The employee must be a sworn, certified (Basic Law Enforcement Training) law enforcement officer, a participant in the Law Enforcement Retirement Program, and has served at least half of his or her time in State service in a qualified law enforcement Position. If the employee does not meet all of these criteria, then the *Separation* Action, rather than the *Separation Pay Continuation* Action, is the appropriate one to use for the separation.

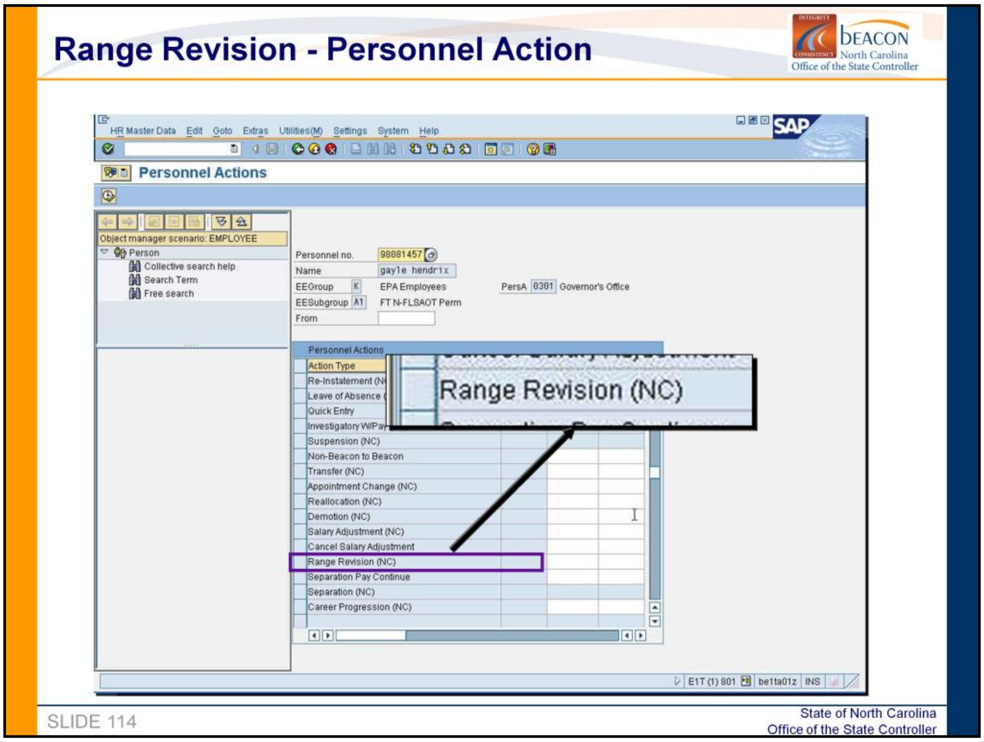
Caution! You **only** use the Separation Pay Continuation for qualified law enforcement officers who are retiring **prior** to their 62nd birthday. If they are retiring on or after 62, you will use the Separation Action.

Also, if you determine that the Separation Pay Continuation is the appropriate Action, you must go to PA30 and enter a Monitoring of Tasks (0019) to remind you when the continuation ends. In the law enforcement retirement example, the effective date is the **last day of the month of the employee's 62nd birthday**. Enter the effective date, with a reminder 2-3 weeks prior that you must complete a regular Separation. This process may be automated in the future.



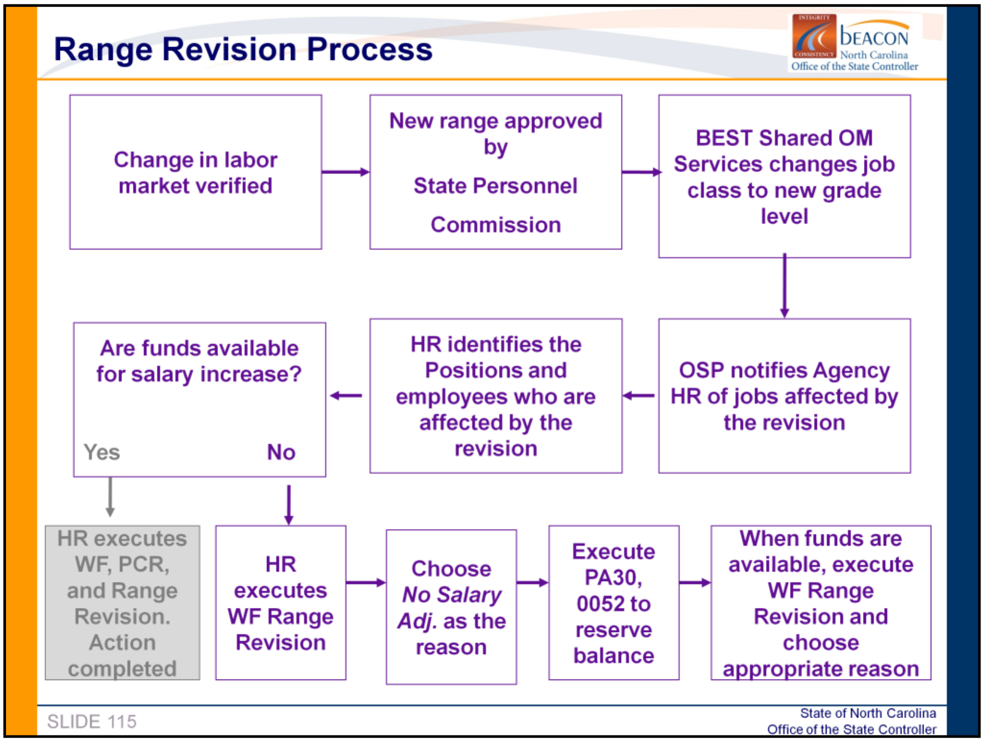
Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.



Notes

In the next exercise, you will continue to combine an Action and Maintain Employee Data.



Notes

In a previous lesson, a Range Revision (RR) was processed where the funds were available to give the employee a salary increase at the time of the revision.

In this next scenario, assume that the funds were not available at the time the employee was eligible for the range revision. You will still initiate the RR Action, but choose no salary adjustment as the reason. You must then execute PA30 Maintain Master Data, infotype 0052-subtype 0100 Wage Maintenance to reserve the balance (enter the amount of the revision, not the entire salary). After funds become available, you will go back to RR and select the appropriate reason. Remember, BEST SSOM must have processed the revision to the Job before you initiate the RR for the employee.

If later, some or all of the funds become available, you will process a series of Range Revisions and PA30s to give the funds to the employee, and reduce the amount of the balance (see the example on the following page).

Exercise #7.4

BEACON North Carolina Office of the State Controller

ZPAA076 – Range Revision

PA30 Maintain Employee Data – Maintain Wage Maintenances

OSP has notified you that a range revision for the Accounting Clerk job class and position has been approved. Additionally, you have been notified that both the job class and the position have been changed by Shared Services Organizational Management to reflect the revision from Grade 59 to 61. The employee's current salary range will be increased by $1,500. You have identified that one employee (Emily Stafford) in your Agency was affected by the revision. However, there are no funds for an increase to the employee. The effective date is today. Observe that the employee's grade has already been changed based on the change that SSOM made to the job class. You need to enter the Range Revision and then reserve the balance for the employee.

Initiate Workflow to begin the process.

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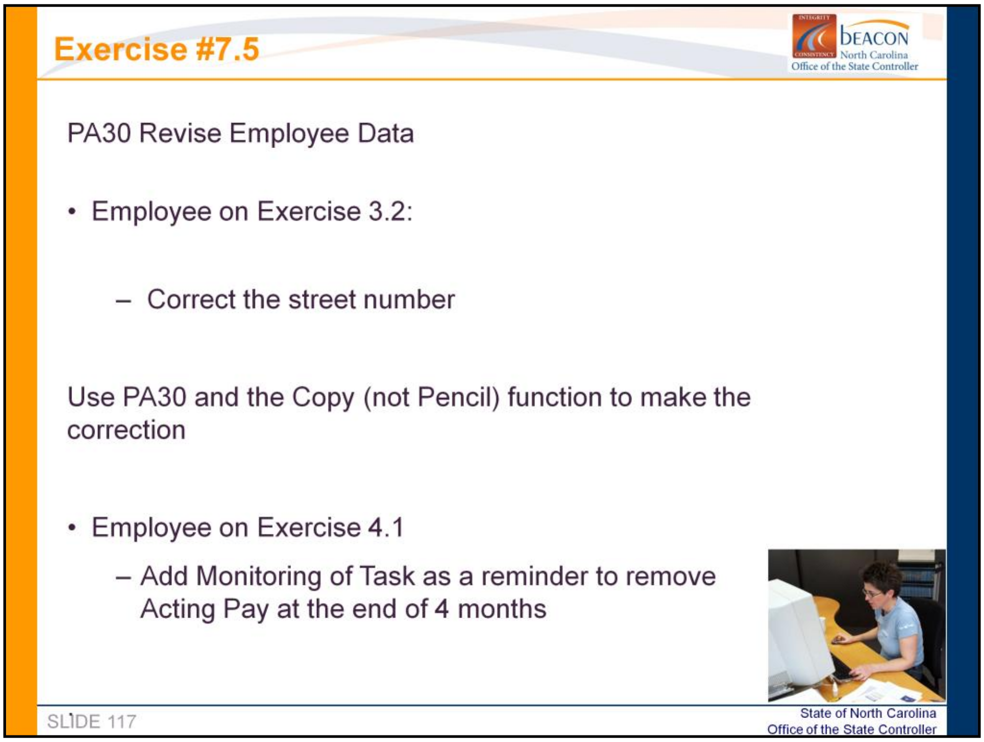
Notes

For example, assume that you put $1,500 in balance for the employee who has a salary of $25,000. A few months later, $500 was available for release. You would initiate the workflow for the Range Revision using the date you were notified that funds were available, not the original Range Revision date. Your reason for the Range Revision would be Range Revision Partial, and the salary amount would be the old salary plus the released reserve, in this example, $25,500. You would then go into PA30 on the infotype 0052-subtype 0100 Wage Maintenance and reduce the balance by that amount. To close infotype 0052, subtype 0100 (to indicate that all funds have been dispersed to the employee), you delimit it using the day after you complete the final action.

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Before you initiate the Range Revision Action, use PA20 to review the employee's current position grade.

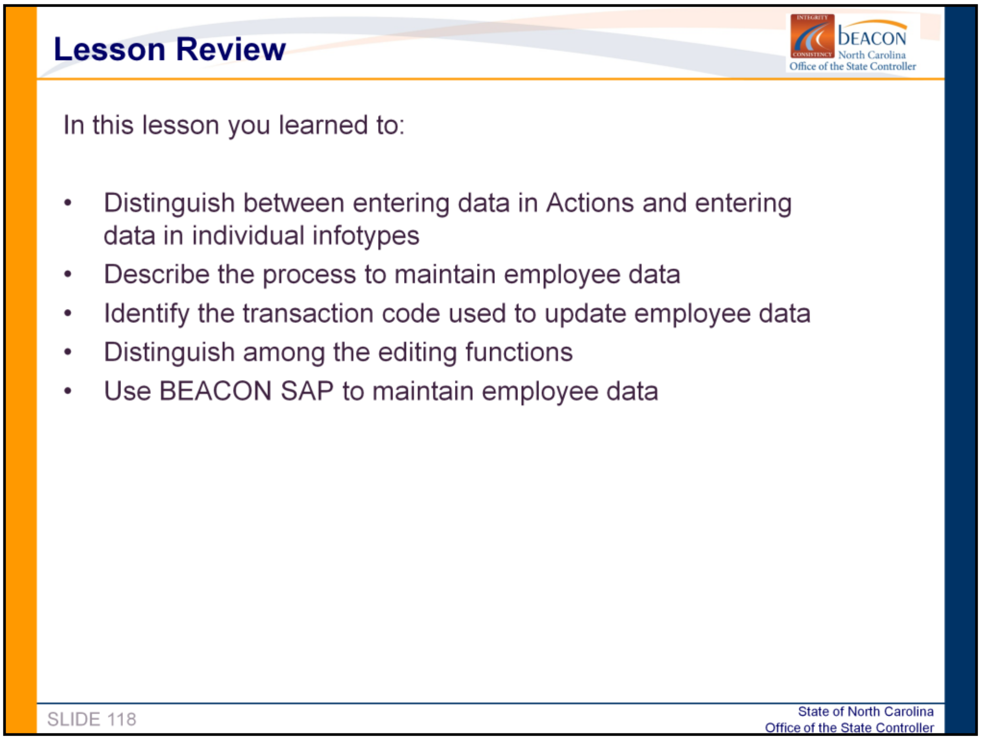


Notes

Be aware that using the Copy function with the same date does not overwrite errors on all infotypes. In those cases, you will need to contact BEST to have the error corrected.

See the Exercise Guide for specific steps on how to correct:

- Employee Group/Subgroup
- New hire or separation date


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Distinguish between entering data in Actions and entering data in individual infotypes
• Describe the process to maintain employee data
• Identify the transaction code used to update employee data
• Distinguish among the editing functions
• Use BEACON SAP to maintain employee data
SLIDE 118
State of North Carolina
Office of the State Controller

Notes


Course Map
BEACON
North Carolina
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Lesson 1: Personnel Administration Review
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Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
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State of North Carolina
Office of the State Controller

Notes

Lesson Objectives

BEACON North Carolina Office of the State Controller

Upon completion of this lesson, you should be able to:

- Identify the steps needed prior to creating an employee's benefits adjustment
- Create a benefits adjustment

SLIDE 120

State of North Carolina
Office of the State Controller

Notes

Benefits Adjustments

- The Adjustments Reasons infotype (0378) may need to be maintained when:
  - A Qualifying Life Event (QE) occurs and is documented
- Employees have 30 days from date of QE to make allowable changes to benefits plans
- Agency verifies qualifying event documentation
  - Qualifying events documentation must be maintained according to State policy
  - Documentation is kept at the Agency level
- Process PA30
- Create infotype 0378-Adjustment Reasons
  - Select applicable reason

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State of North Carolina
Office of the State Controller

Notes

After an employee enrolls in a benefits plan, he or she can only make changes to the plan during the year when a Qualifying Event (QE) occurs, or during the annual enrollment period.

Examples of QEs are shown on the next two pages.

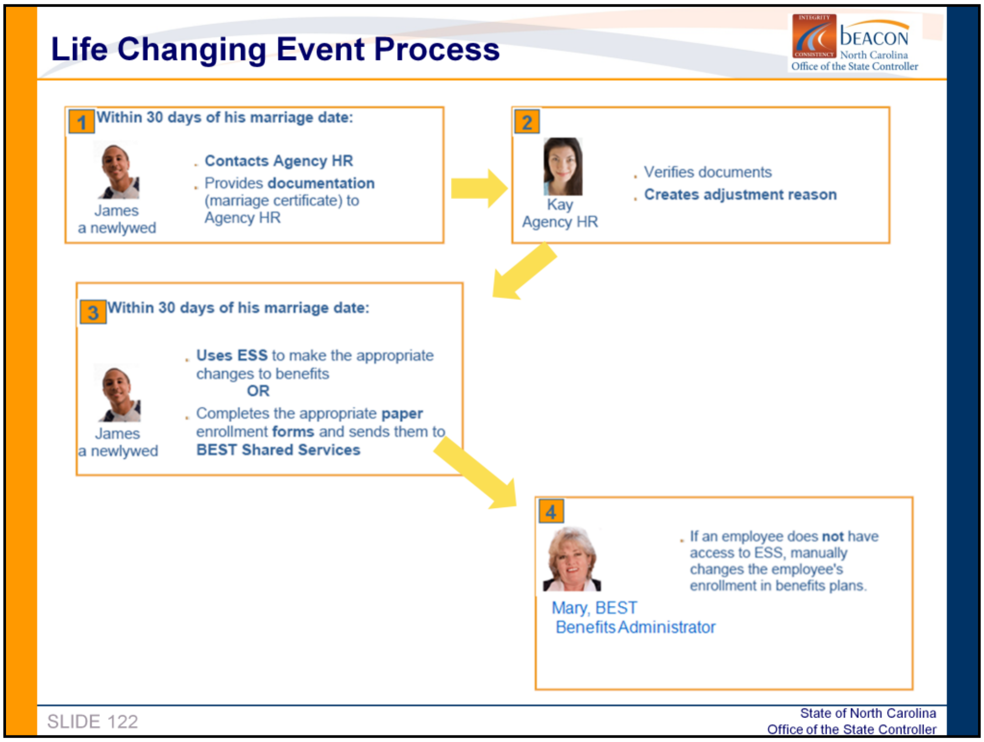
The Agency is responsible for verifying the QE documentation and must maintain the documentation in accordance with State policy. Documentation is to be maintained at the Agency level.

In order for the benefits to be changed, the HR Master Data Maintainer must create infotype 0378, Adjustment Reasons.

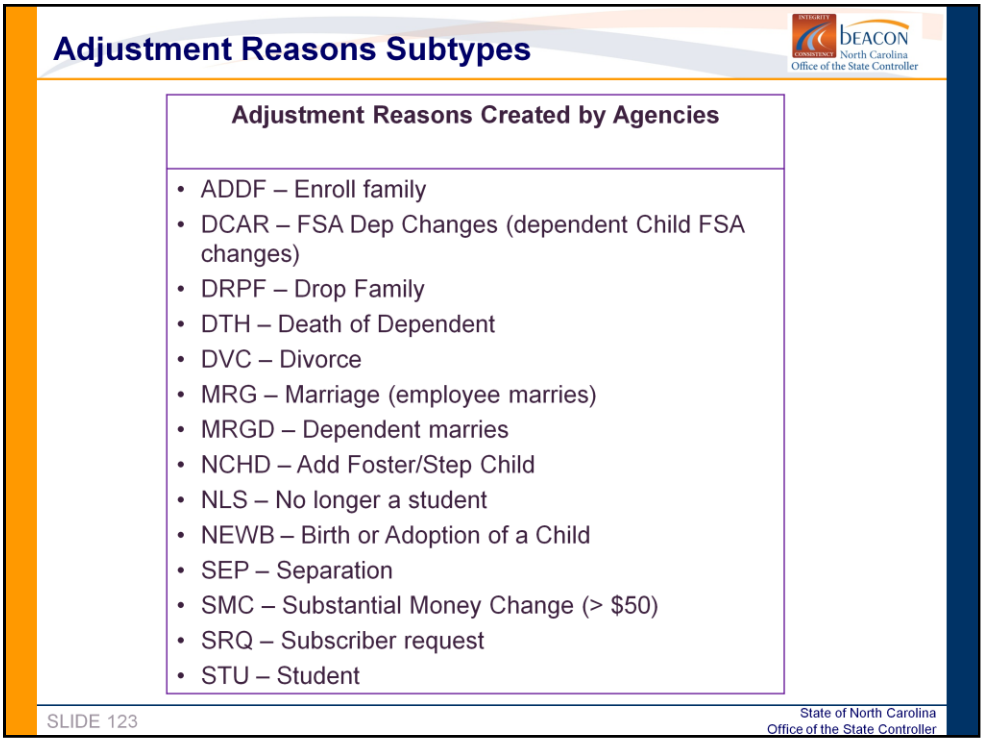
After infotype 0378 is created, employees can change their benefits by either:

- Accessing Employee Self Service (ESS) and making the change or,
- Completing applicable paper forms and submitting them to BEST Shared Services

The effective date for infotype 0378 is the date of the qualifying event. For example, in the case of the birth of a child, it is the date the child was born.


Life Changing Event Process
BEACON North Carolina Office of the State Controller
1 Within 30 days of his marriage date:
Contacts Agency HR
Provides documentation (marriage certificate) to Agency HR
James a newlywed
2
Verifies documents
Creates adjustment reason
Kay Agency HR
3 Within 30 days of his marriage date:
Uses ESS to make the appropriate changes to benefits
OR
Completes the appropriate paper enrollment forms and sends them to BEST Shared Services
James a newlywed
4
If an employee does not have access to ESS, manually changes the employee's enrollment in benefits plans.
Mary, BEST Benefits Administrator
SLIDE 122
State of North Carolina
Office of the State Controller

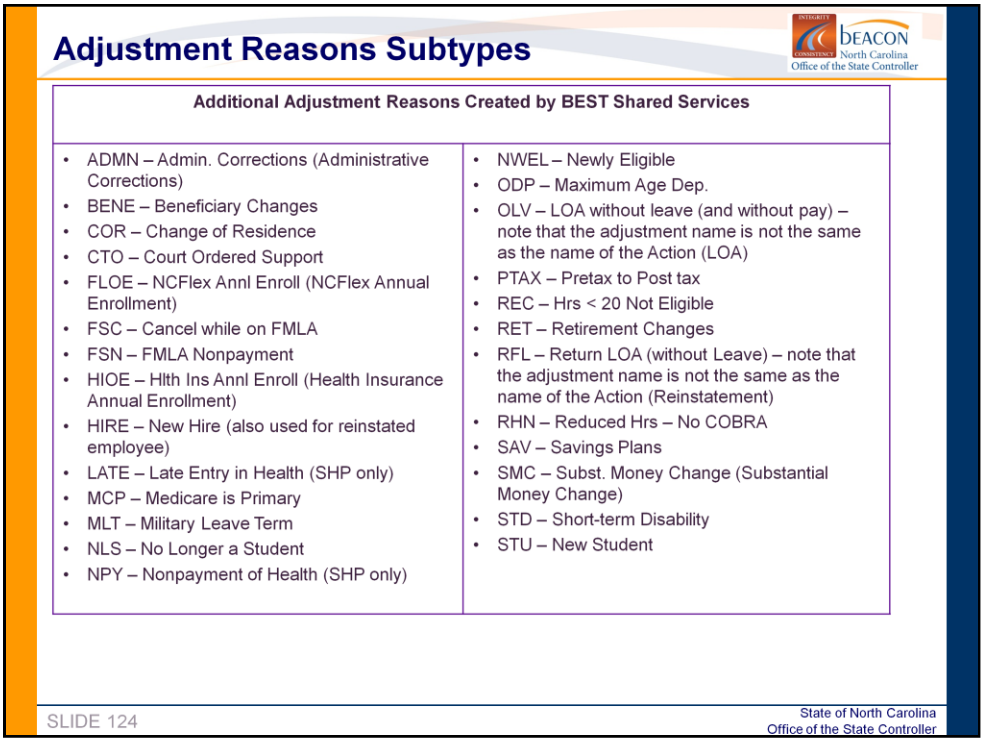
Notes



Notes

When infotype 0378 is created, there are several adjustment reasons listed in the drop-down list. However, only a few of those reasons (listed above) can be entered at the Agency level.

If an employee has benefits adjustments other than those listed above, the employee must contact BEST Shared Services.



Notes

BEST Shared Services has the authority to use all of the benefits reasons, including the ones used by the Agencies (listed on previous page).

Additional reasons that an employee must call BEST Shared Services for are listed above.

A complete list of the benefits adjustments is available online at BEACON University. Under Courseware and job aids, select the **Benefits** functional area, Benefits Job Aid folder, and the BN200 Adjustment Reasons file. The reasons with the asterisk (*) on this job aid can be created by Agency HR. The others must be created by BEST Shared Services.

Notes

When an employee's child no longer qualifies as student status, it is critical that the employee notify the Agency within 30 days of the event. Otherwise, the Adjustment Reason cannot be processed at the Agency level; it must be processed by BEST.

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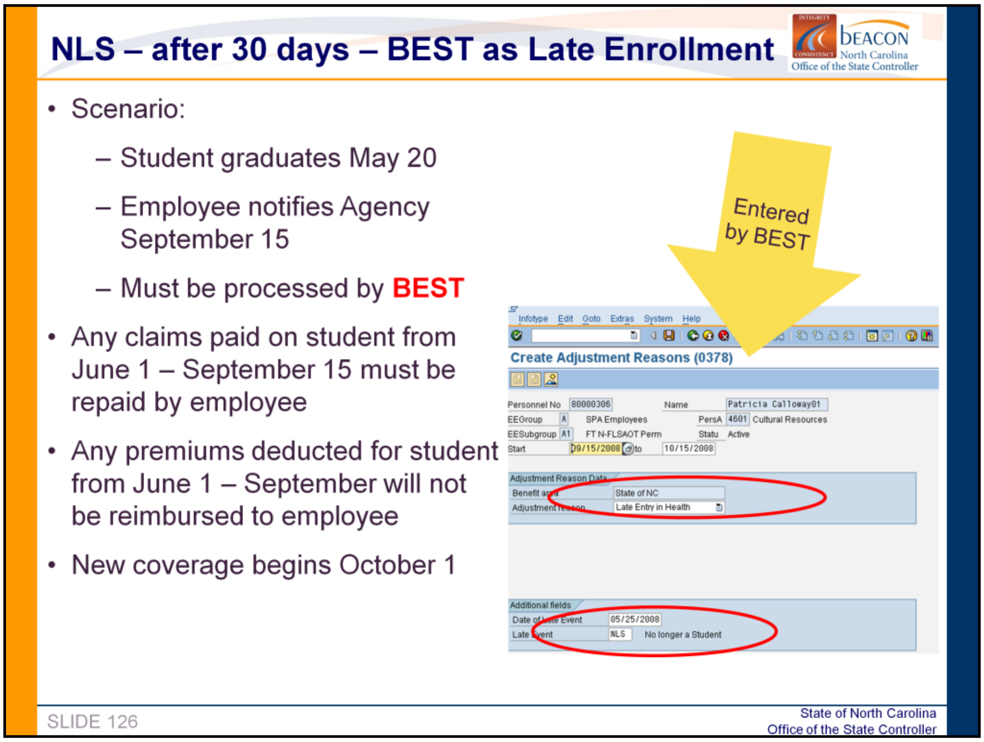


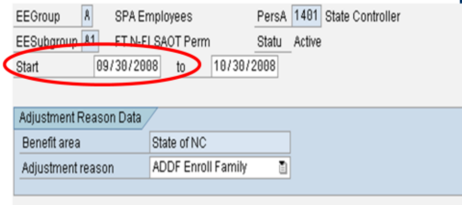
Notes

If notification regarding the child no longer being a student is done 30 days after the event, the employee must understand the following:

- Any claims that were paid on behalf of the student will have to be repaid to the insurance company
- Any premiums that the employee had deducted to pay for coverage including the child will not be reimbursed

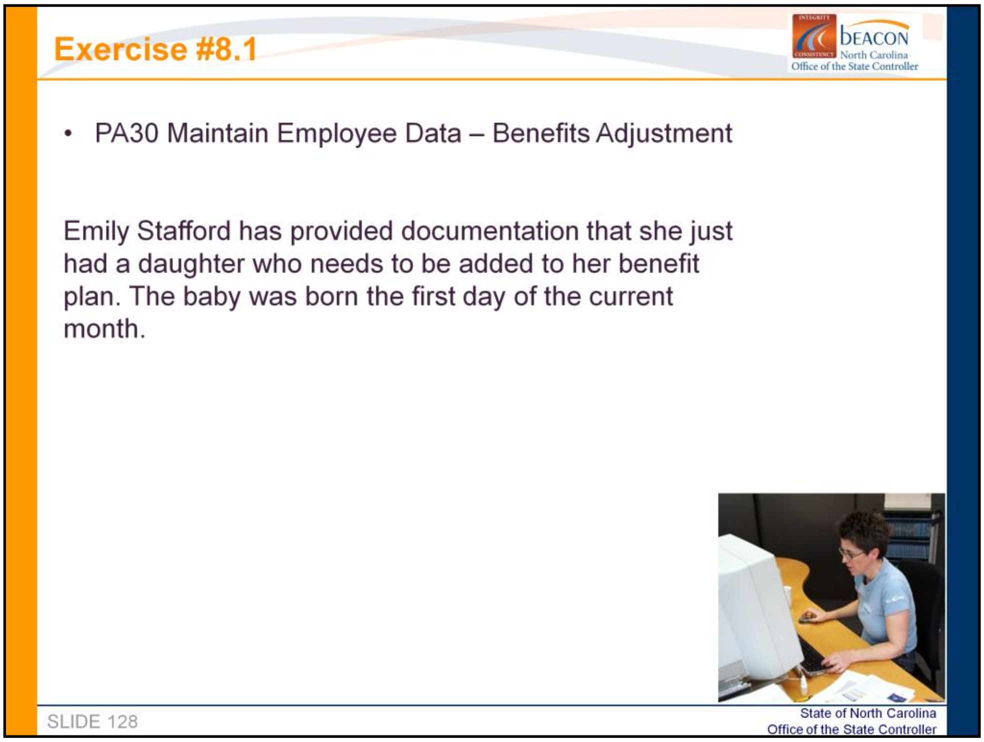
Important Items

- Benefit Plans start the first of the month after the Adjustment Reason date (except birth of child).
- Use the appropriate Adjustment Reason.
  - COBRA events are triggered through the Adjustment Reason



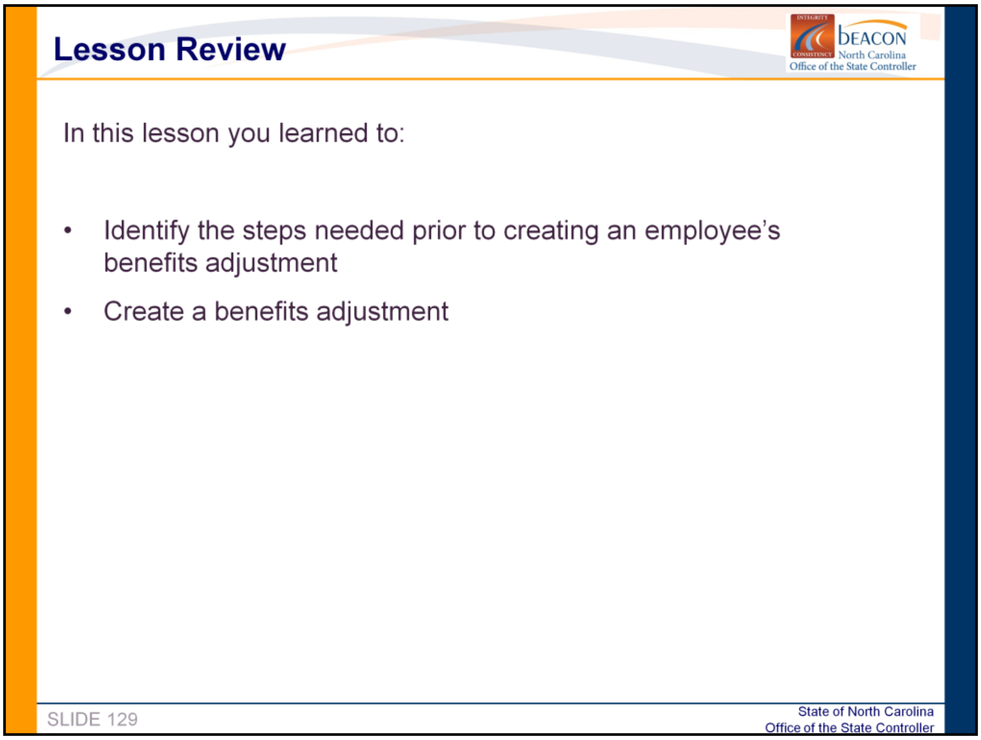
Notes

The effective date of IT0378 is critical. Except for birth of a child (benefits begin on date of birth), benefit plans start the first of the month after the Adjustment Reason date. So for example, if a spouses loses job and health coverage on October 1, then the Adjustment Reason date must be September 30 in order for State plan to start on October 1; otherwise if IT0378 is effective October 1, the State plan won't start until the first day of November.



Notes

Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Identify the steps needed prior to creating an employee's benefits adjustment
• Create a benefits adjustment
SLIDE 129
State of North Carolina
Office of the State Controller

Notes


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Personnel Administration Review
Lesson 2: Introduction to Actions
Lesson 3: Entering Employees into BEACON SAP
Lesson 4: Adjusting Salaries
Lesson 5: Promoting Employees
Lesson 6: Separating Employees
Lesson 7: Updating Employee Data
Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
SLIDE 130
State of North Carolina
Office of the State Controller

Notes

Lesson Objectives

BEACON North Carolina Office of the State Controller

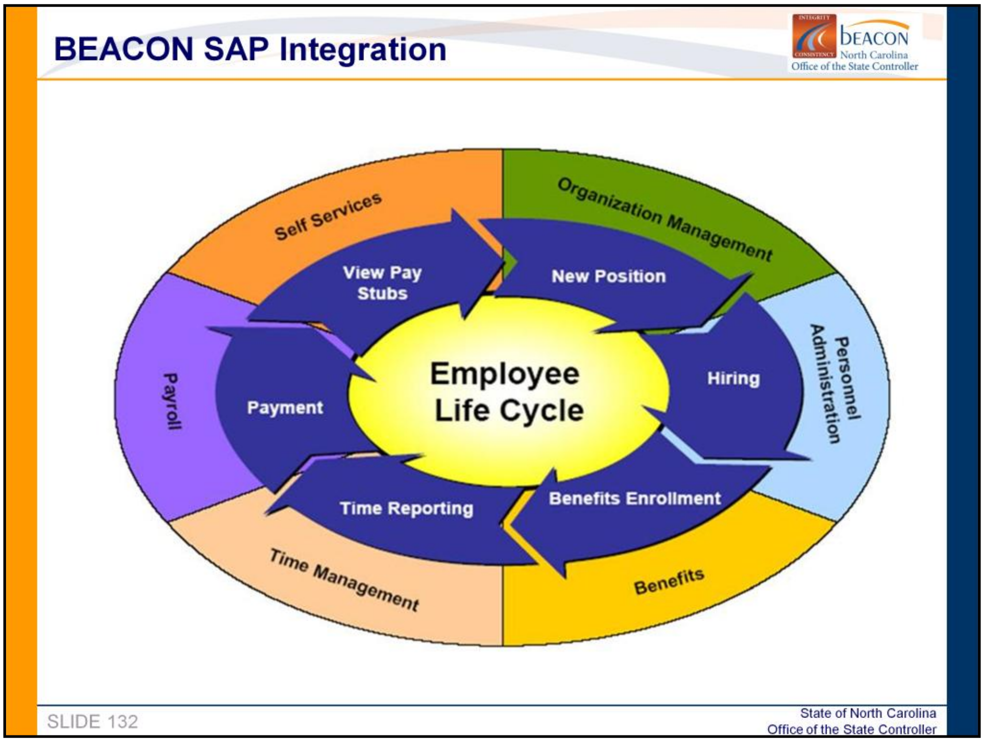
Upon completion of this lesson, you should be able to:

- Identify how PA Actions affect employee time, benefits and pay
- Describe how a work schedule assignment affects an employee's pay
- Revise a work schedule
- Create a substitution
- Revise the time settings on a position
- Explain when to notify payroll regarding changes in settings

SLIDE 131

State of North Carolina
Office of the State Controller

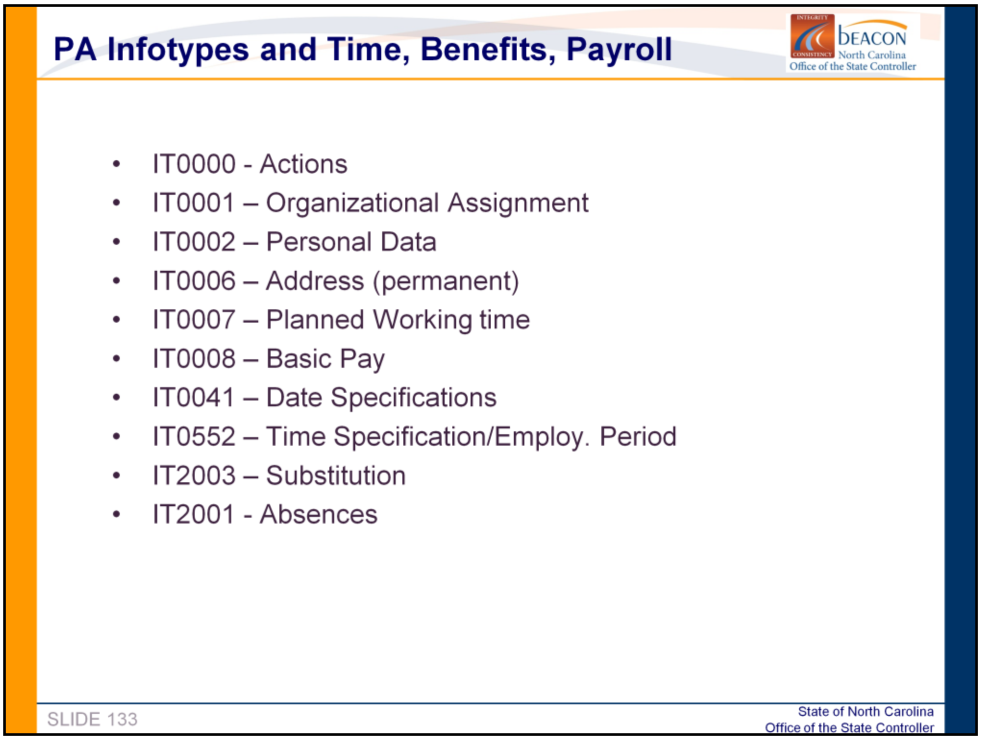
Notes



Notes

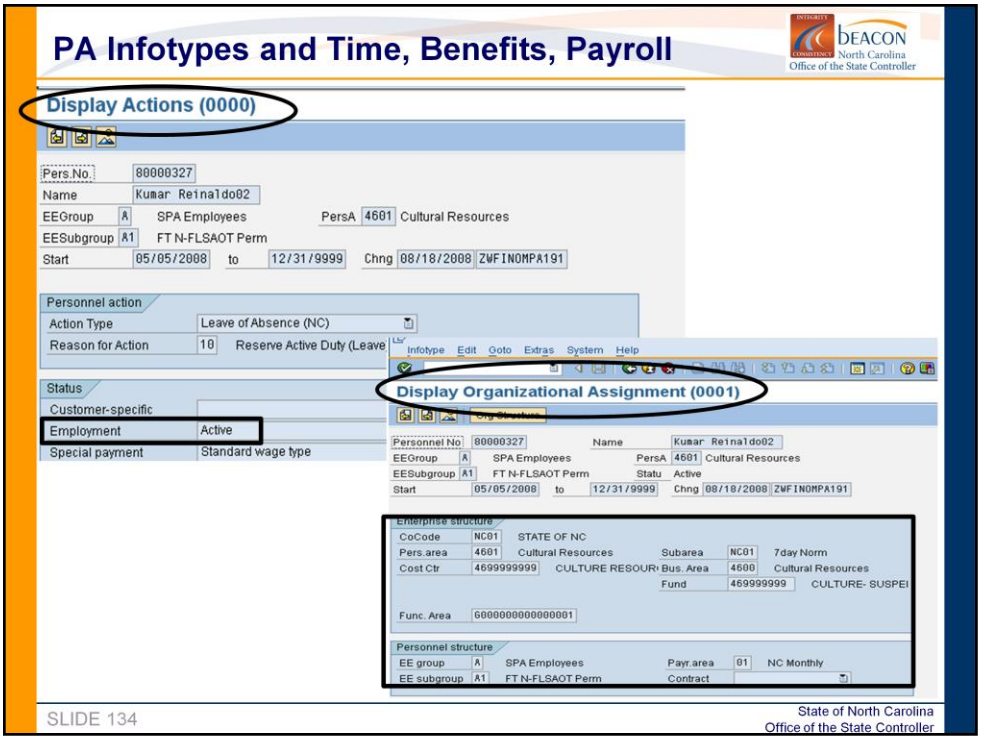
Based on the exercises you have performed thus far, you should have a good understanding of the various infotypes that are part of an employee's personnel record. Because BEACON is an integrated system, every entry made in Personnel Administration affects some component of an employee's time and pay.

Some infotypes that PA is responsible for are applied directly to the employee. Many of the infotypes that affect an employee's time and pay display automatically during PA Actions. Other infotypes are applied to the position, which also affect how the employee enters time and is subsequently paid.



Notes

The infotypes listed above are entered in PA, but affect an employee’s time, benefits and payroll. It is important to understand how the entries made in PA are related to results in those areas.

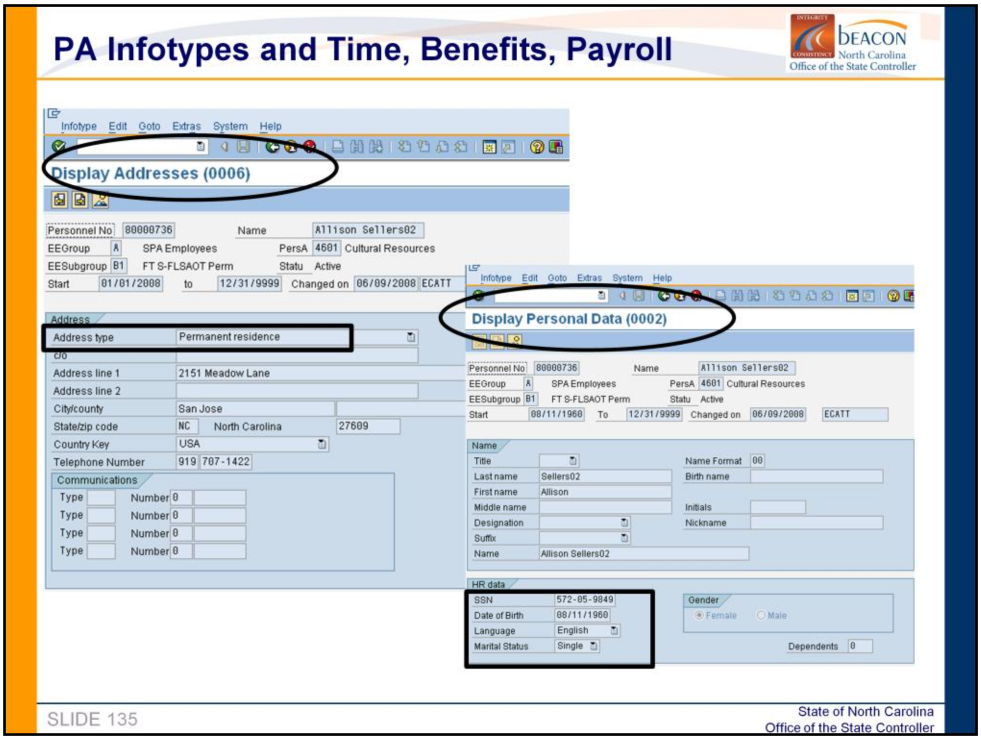


Notes

Time, Payroll and Benefits pulls information from IT0000 and IT0001.

- **Actions IT (0000)**: Employment status (Active, Inactive, Withdrawn).
- **Org Assignment IT (0001)**: Employee Group, Employee Subgroup, Personnel Area, Personnel Subarea, and Payroll area.

For a complete description of the above infotypes, see *Lesson I*.



Notes

Personal Data IT0002

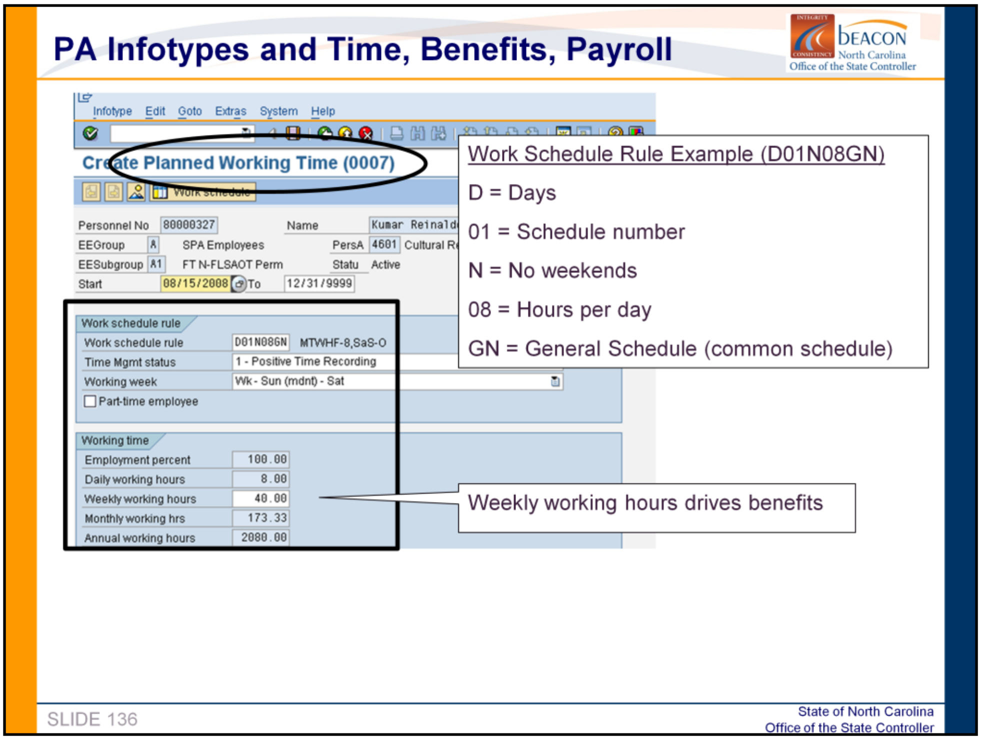
Social security number, date of birth and marital status.

Addresses IT0006

The various tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are dynamically associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll. **Note:** When entering an address, always use *Address line 1* and not Address line 2.

If the address information is incorrect:

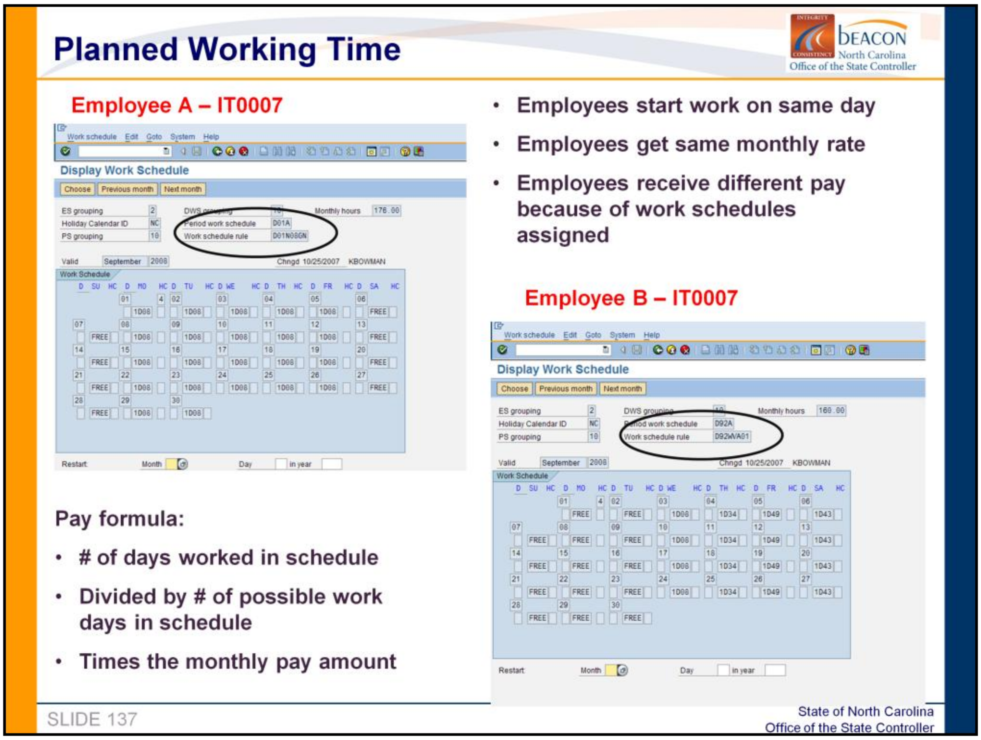
- a separated employee does not receive the final pay.
- employees do not receive W2s at the end of the year.



Notes

Planned Working Time: The Work Schedule Rule (WSR) is the foundation upon which an employee's time is processed in BEACON SAP. Each employee is assigned a WSR in PA that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days as well as scheduled non-work days. The WSR can represent work patterns repeated over a single or multiple weeks and may include day, evening and night shift designations that trigger premium payments (if applicable) at rates designated on the employee's position (if the position is appropriately flagged). The WSR does not limit the number of hours an employee may record on any given day, but will only allow leave to be taken on scheduled work days. Many fields are dynamic and trigger other time functions. For example, Time Sheet Defaults (IT3015) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of "1" indicates that a time sheet is required, whereas a "9" indicates a Time Sheet is not required. If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative upon Reinstatement.

An employee should only be assigned as a negative time employee if he or she is working 5 days a week, 8 hours a day.



Notes

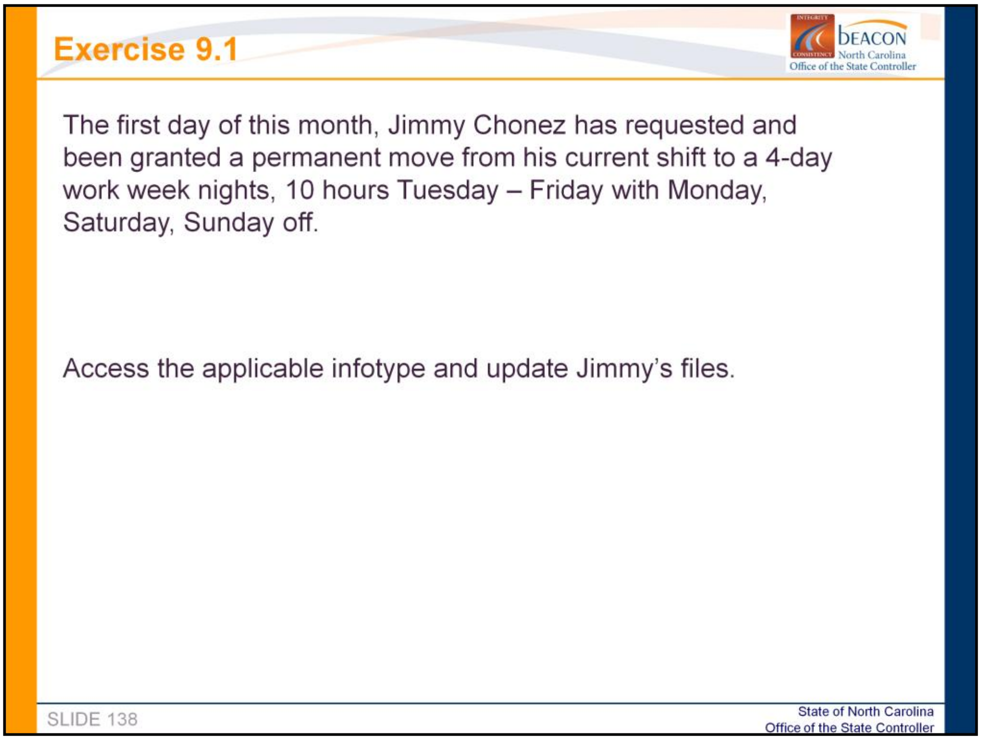
Example of IT007 Impacts Employee's Pay (1st and last pay)

To show how IT0007 affects an employee's pay, the following describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th , the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, in conjunction with IT0008, determined two different pay outcomes for the employees once again illustrating how entries made in PA affect employee pay or time.


Exercise 9.1
BEACON
North Carolina
Office of the State Controller
The first day of this month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week nights, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.
Access the applicable infotype and update Jimmy's files.
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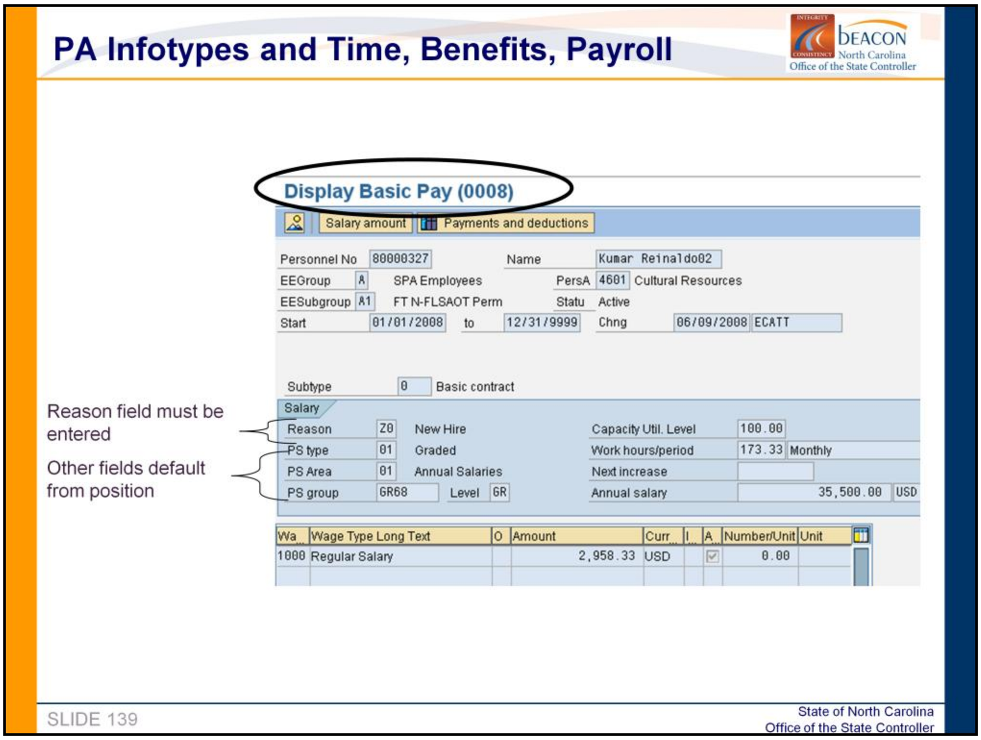
State of North Carolina
Office of the State Controller

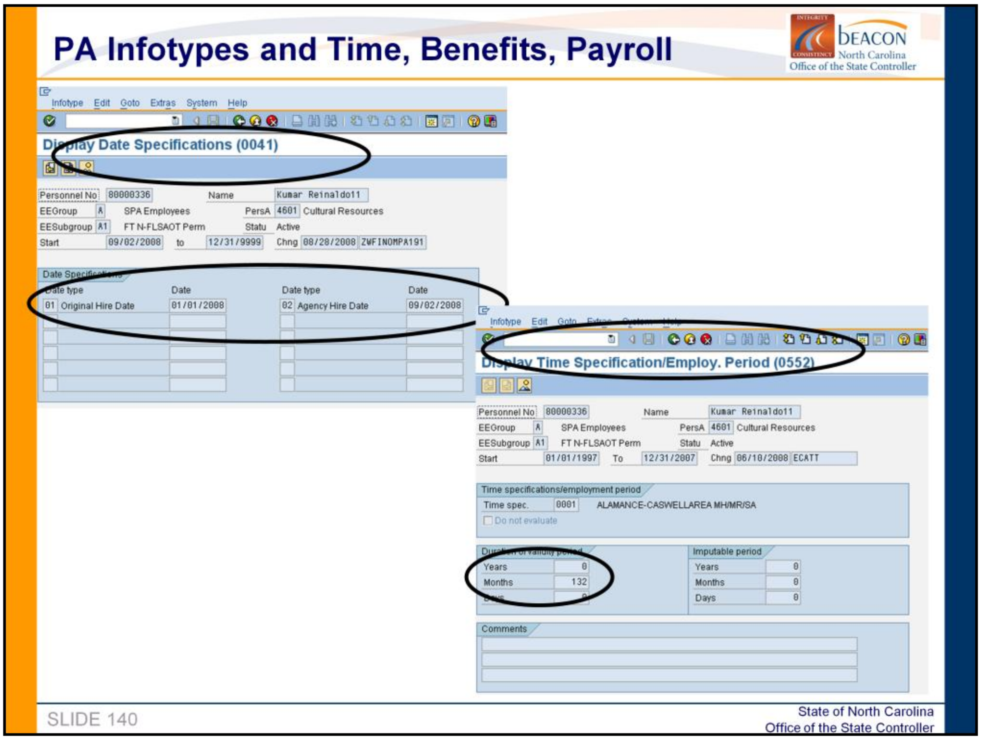
Notes



Notes

Basic Pay: Salary or hourly wages. The *Salary Amount* button does not calculate for DOT employees, but does calculate for all non DOT wage types. The Reason field must be manually entered during the Action; however the remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the “Amount” field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee’s pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is an employee returning to work part-time while receiving partial Worker’s Comp.



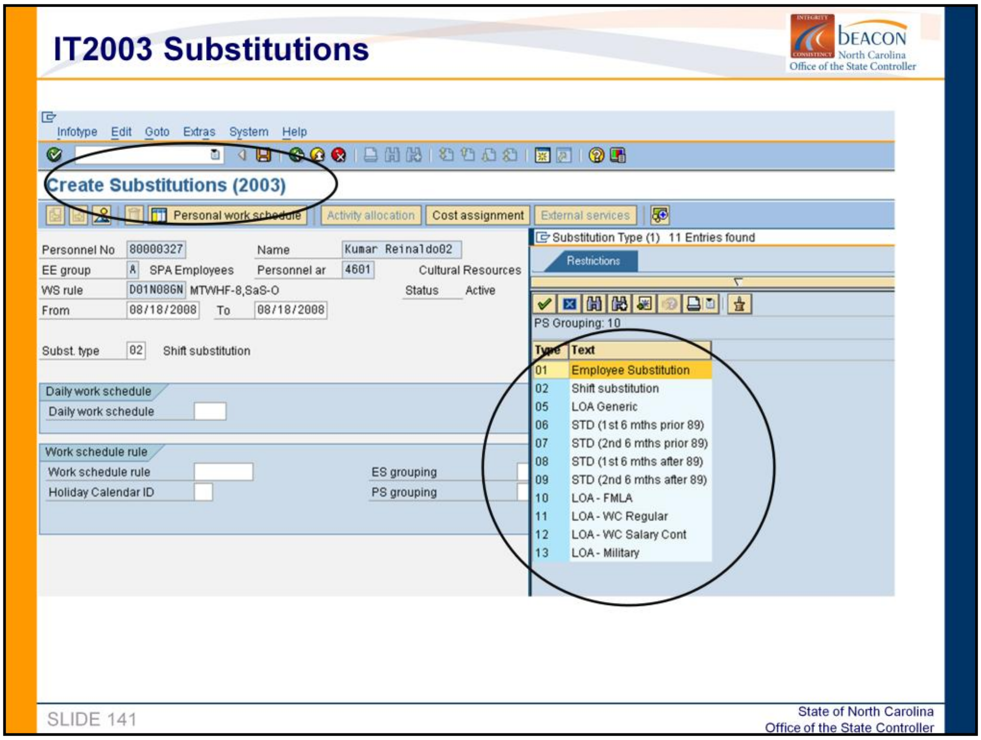
Notes

Date Specifications IT0041

As indicated previously, time evaluation bases leave accruals and longevity payments on date types contained on IT0041 for all permanent employees (newly hired Supplemental Staff employees will not have IT0041). Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

Time Specification/Employ. Period IT0552

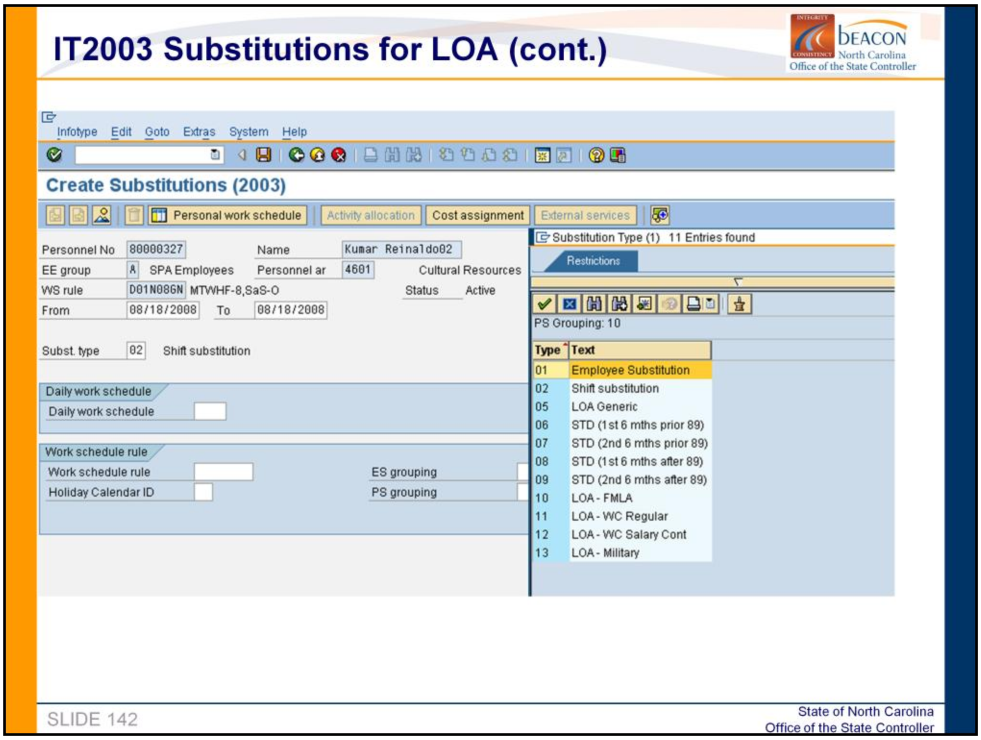
Creditable service earned prior to BEACON must be entered on IT0552. Once an employee is entered into BEACON, the system automatically calculates creditable service and the longevity date through the Time module. If HR makes changes to IT0552 that affect the longevity date, BEACON will take back any money already paid out and repay based on the new longevity date. If you do make a change on IT0552, you must email BEST with the name of the employee. Keep in mind that you will never adjust the original IT0552 entry from conversion. For example, if an employee has creditable service from more than one organization, you would enter additional IT0552s to add the additional organizations (you would not extend the date on the original IT0552 to include the additional service dates).



Notes

The Substitutions infotype is used to indicate that the employee is working something other than his or her regular schedule or is on a Leave of Absence. Substitutions may be daily or for weeks at a time. IT0007 – Planned Working Time is overwritten with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule (for example: employee works a shift with premium pay is being asked to work a shift where premium pay is not eligible or is eligible at a different rate, or vice versa).
- A full-time employee is returning from a Worker's Comp LOA (Reinstated Action), but is only working 4 hours a day. PA30 is used to create IT2003 Substitution with a 4 hour schedule. In this case, IT0008 must also be adjusted.
- An employee is on Leave of Absence (LOA). IT2003 is entered as part of the LOA Action (see next page).



Notes

Although Leave of Absence (LOA) is covered in *PA410 Advanced Create and Maintain Employee Data*, you should be aware of how the LOA Action affects an employee's time.

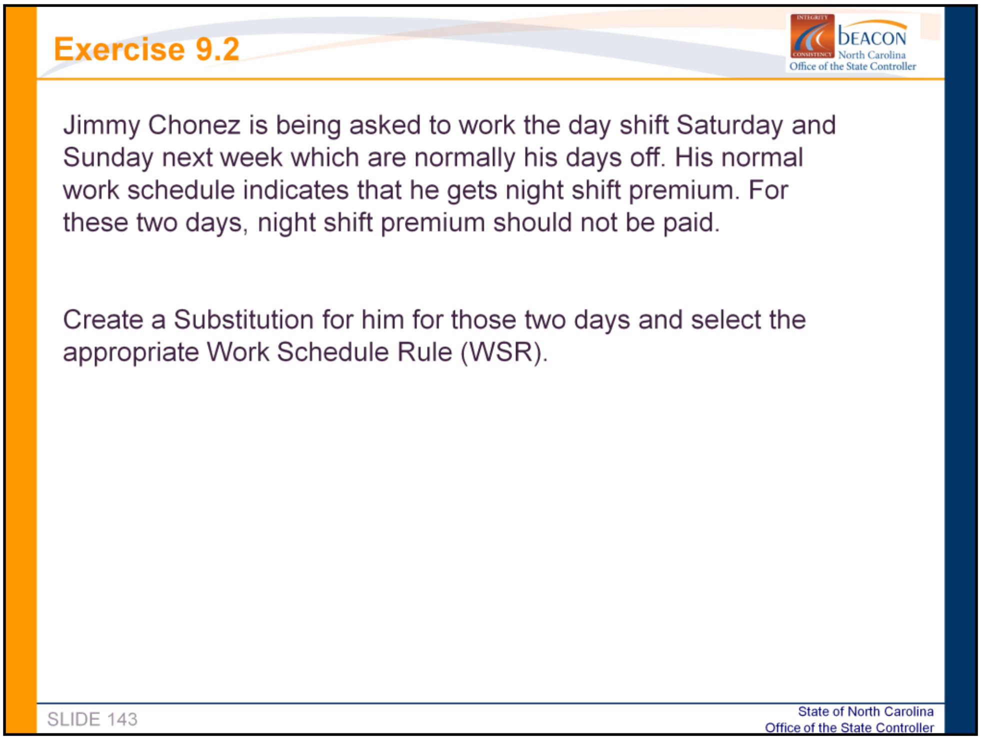
Without exception, every employee on LOA must be placed on a substitution work schedule. IT2003 - Substitution displays as part of the LOA Action.

Date: The ***From*** date should be the date of the Action, and the ***To*** date should be 12/31/9999 (only for LOA). When the employee is reinstated, you will delimit IT2003 as part of the Reinstatement Action.

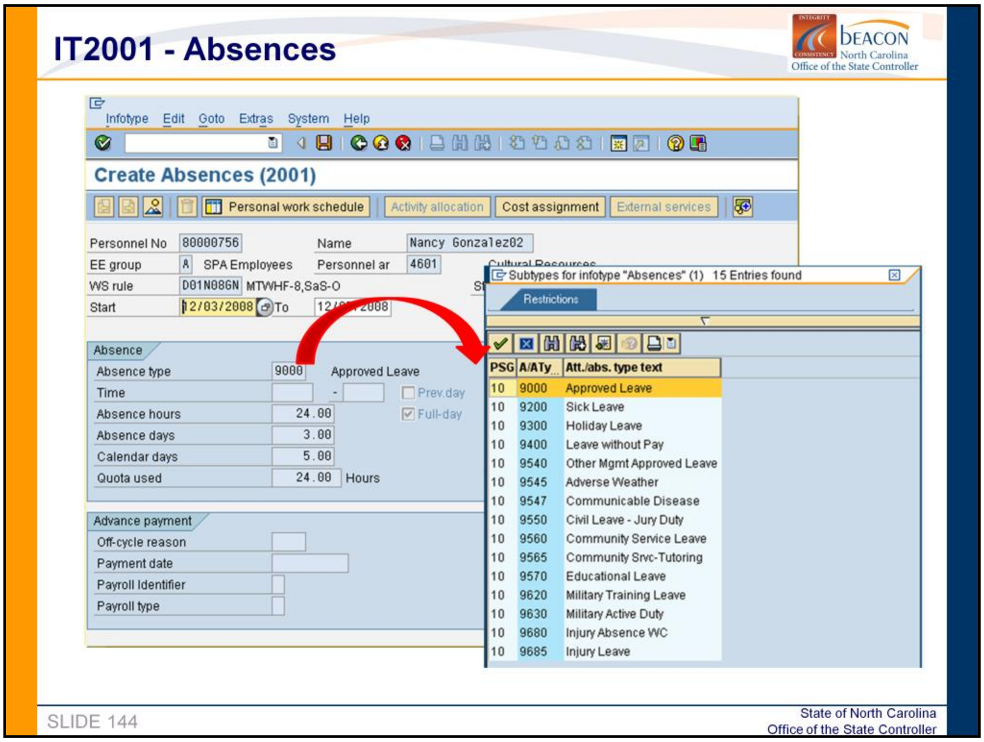
Substitutions type: Select the applicable type for the Action (see illustration above).

Daily work schedule: Leave blank.

Work Schedule Rule for LOA: If the employee is FT (40 hours a week), enter work schedule D01N08GN into the Work Schedule rule field (even if the employee is already on D01N08GN, you must still enter IT2003 for that code). If the employee is PT use the matchcode in the Work schedule rule field to select the appropriate PT schedule. By placing the employee on a Substitution in addition to making the employee positive time (subsequent page), BEACON will use an 8-hour day for recorded absences or leave for a full-time employee (or the applicable number of hours entered for a PT employee).


Exercise 9.2
BEACON
North Carolina
Office of the State Controller
Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule indicates that he gets night shift premium. For these two days, night shift premium should not be paid.
Create a Substitution for him for those two days and select the appropriate Work Schedule Rule (WSR).
SLIDE 143
State of North Carolina
Office of the State Controller

Notes



Notes

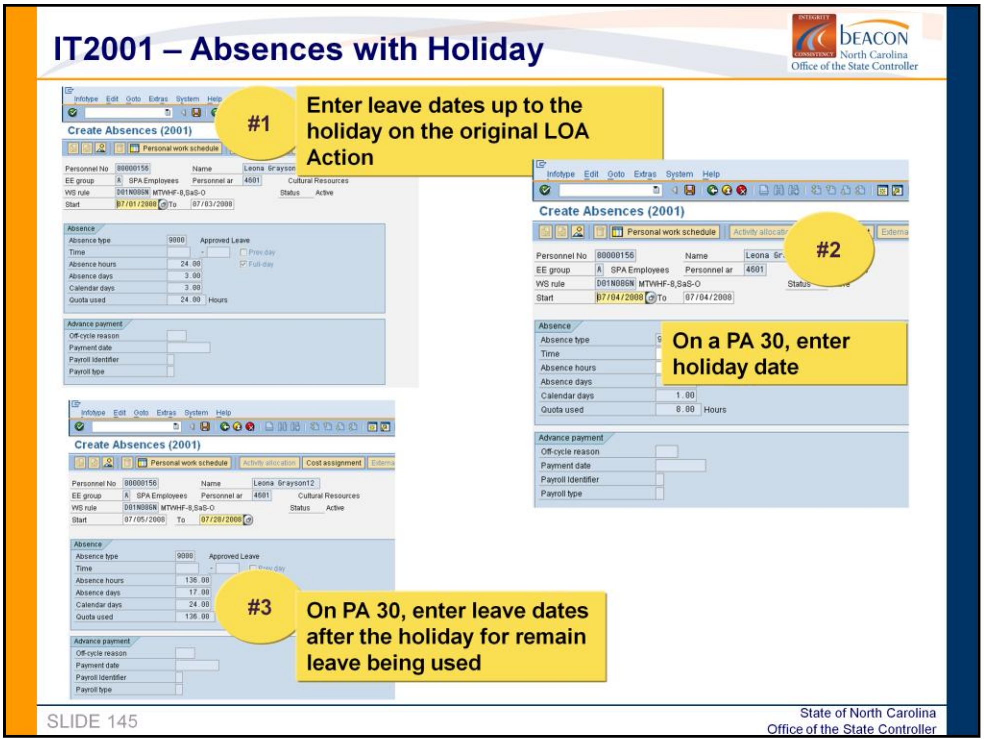
The Absences infotype (2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave. While IT2001 is entered during the LOA Action, it may be necessary to use PA30 in some circumstance such as:

- The employee wants to exhaust more than one leave type while on LOA. Since only one type can be entered in the LOA Action, PA30 is necessary to enter the additional leave types.
- The employee does not return when expected and wants to extend the use of leave.
- The employee returns earlier than planned and the infotype needs to be delimited.

When the dates are entered, the hours that default are based on the work schedule rule entered on the Substitution infotype (2003) which was created as part of the LOA Action.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

As long as the employee is receiving pay (leave or work), benefits will continue to be deducted. If not receiving pay, employee must pay for benefits or discontinue them.



Notes

If the employee is exhausting leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 7/1/2008 To: 7/3/2008 (24 hours **leave**)

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 7/4/2008 To: 7/4/2008 (8 hours **holiday**)

3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:

   Start: 7/5/2008 To: 7/28/2008 (136 hours **leave**)

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012

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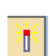
State of North Carolina
Office of the State Controller

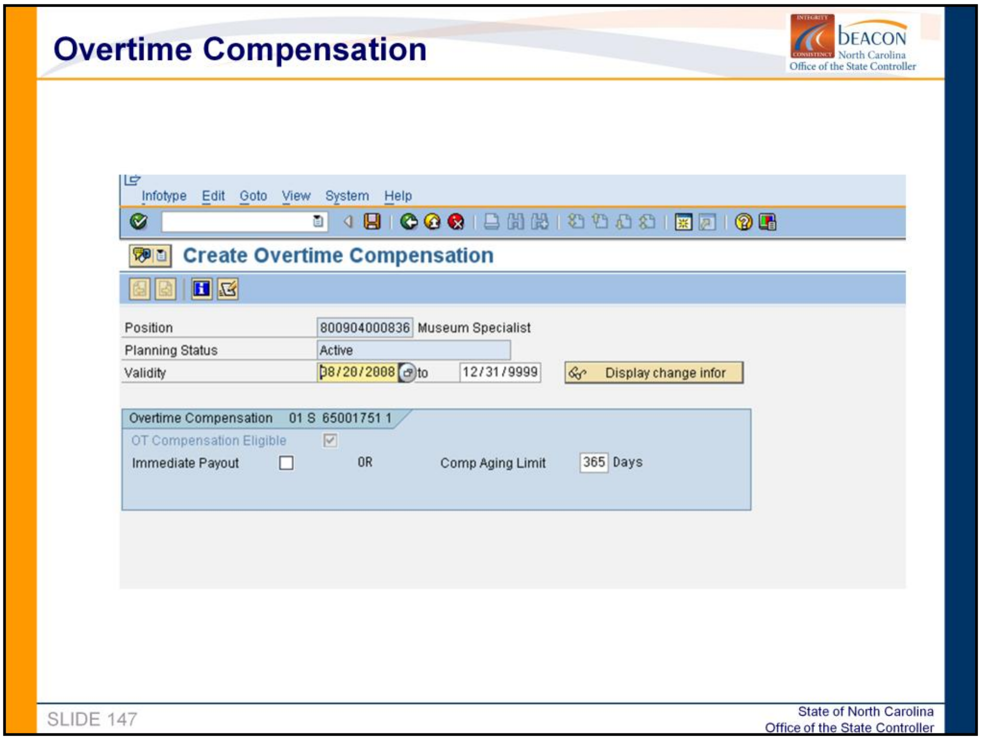
Notes

HR personnel that have access to PO13 are responsible for updating the above infotypes on a position. If the position infotypes for the various types of pay are not flagged correctly, the employee may enter hours correctly and they may have been approved by the manager, but unless the position infotype is flagged correctly, the employee will not receive the correct pay.

It is important to understand that if you **revise** a **position** setting that is **retro** to a pay period prior to the current pay period, you **must contact BEST Payroll** to let them know to run time eval on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you only revise time on an employee, BEACON will automatically retro the time eval run.

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the “Activate infotype” button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

Activate Infotype button: 

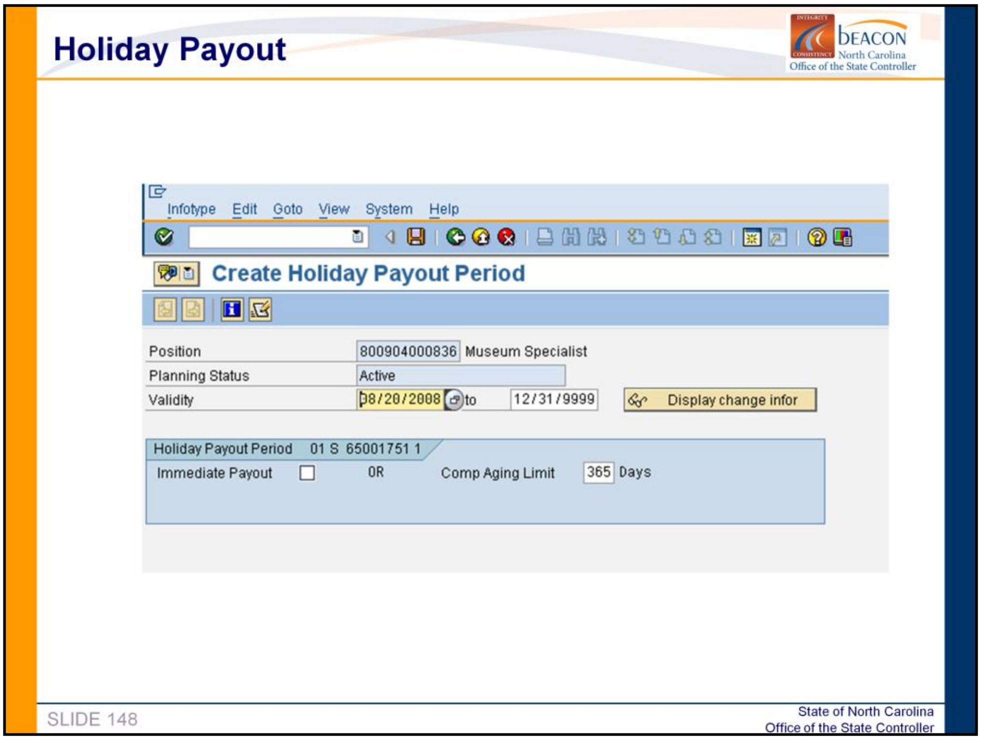


Notes

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 in conjunction with IT2012 (discussed later) determine the rules around the overtime compensation.

As indicated previously, an employee may have worked over 40 hours and entered the hours on the time sheet and they may have been approved by the manager. But unless the position Overtime Compensation infotype is flagged correctly, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

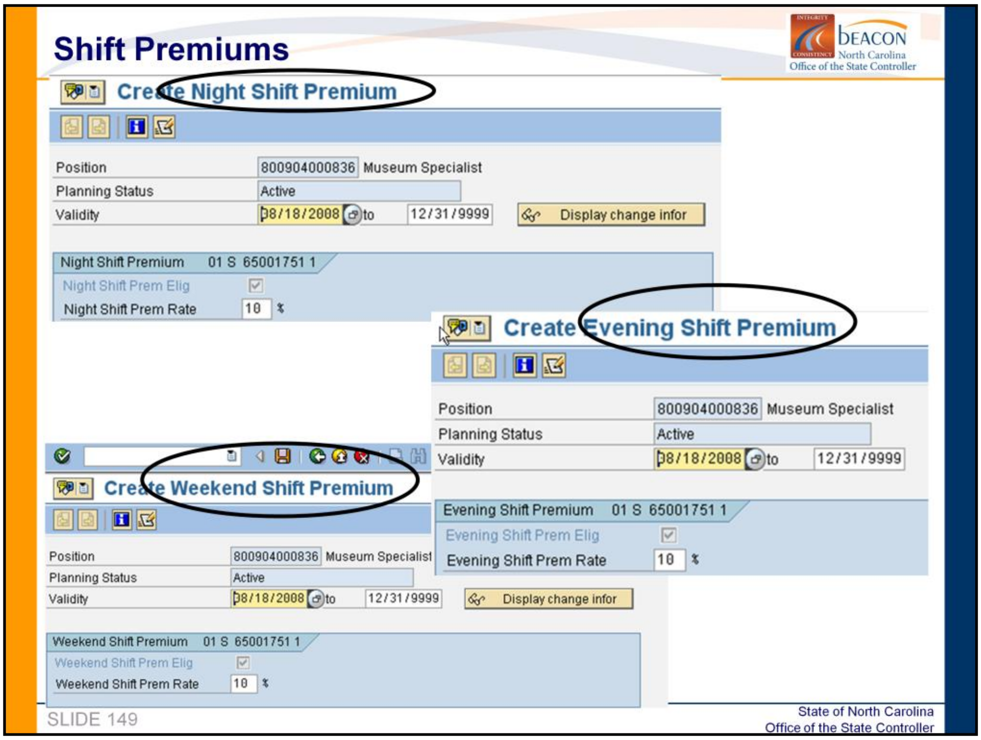


Notes

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.



Notes

Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the rate field.

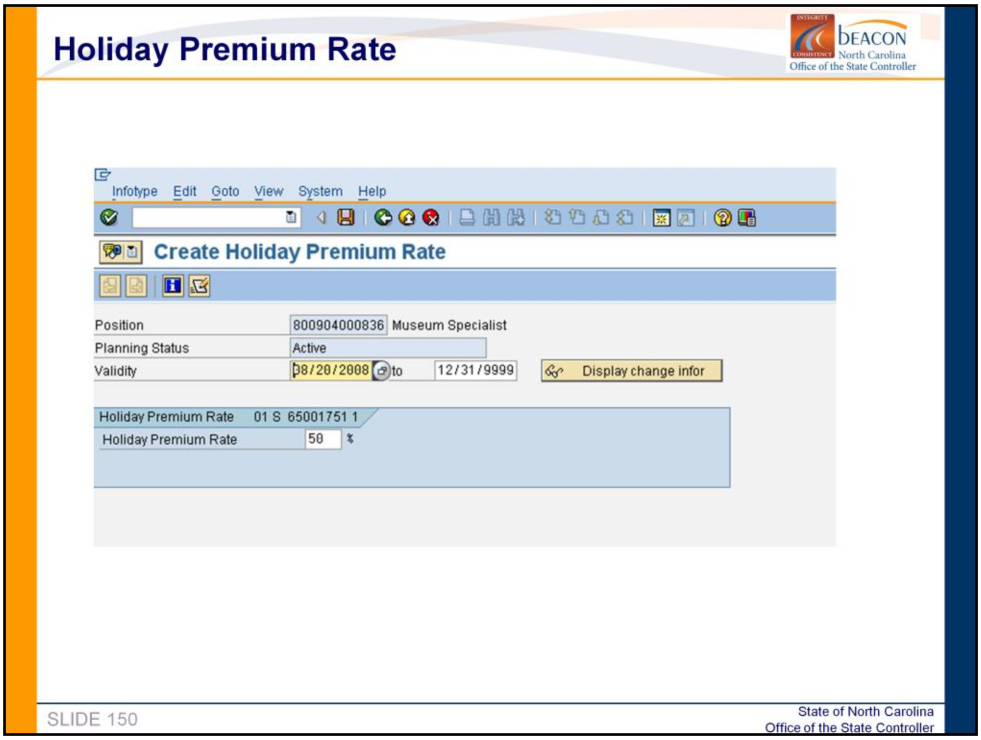
Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are added together on one "Shift Premium" line item on the pay stub with the rate of 10%. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

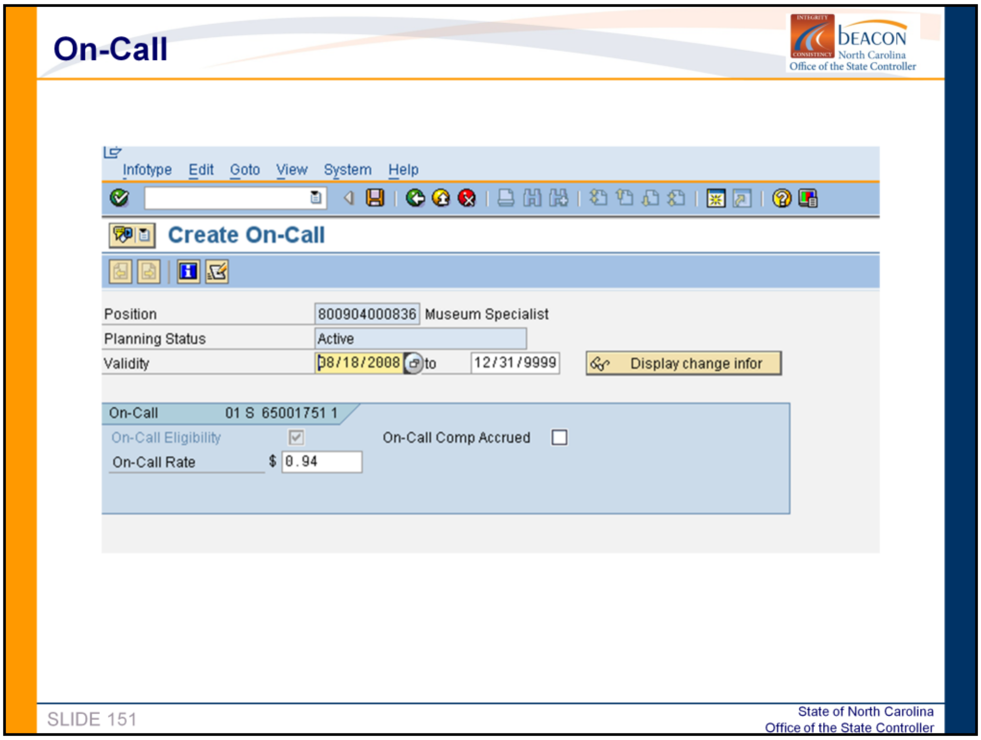


Notes

Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the rate field.

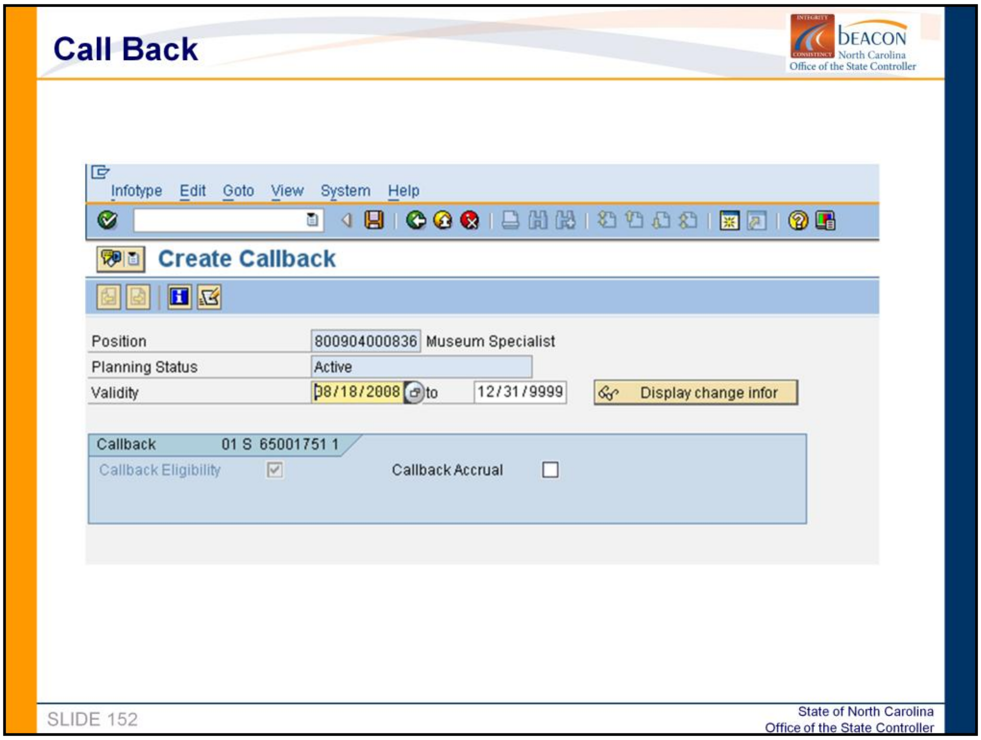


Notes

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

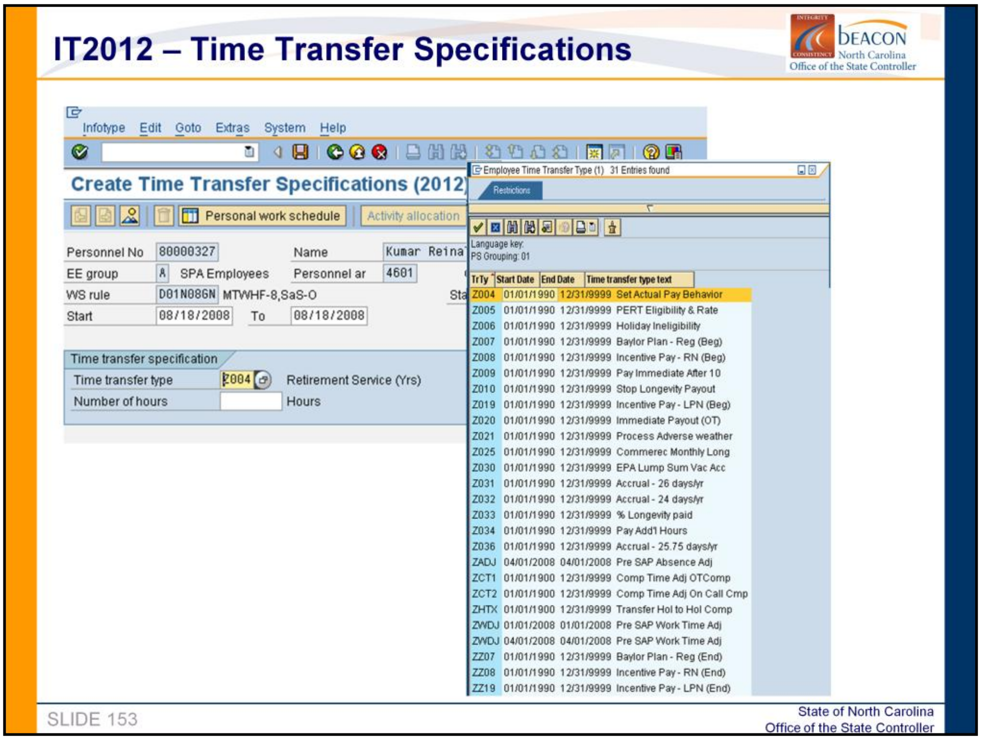
The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.



Notes

Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.



Notes

The “Time Transfer Specifications” infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. As the HR Master Data Maintainer, it may be helpful if you understand the following subtypes for the time infotype 2012:

Z004 - Set Actual Pay Behavior

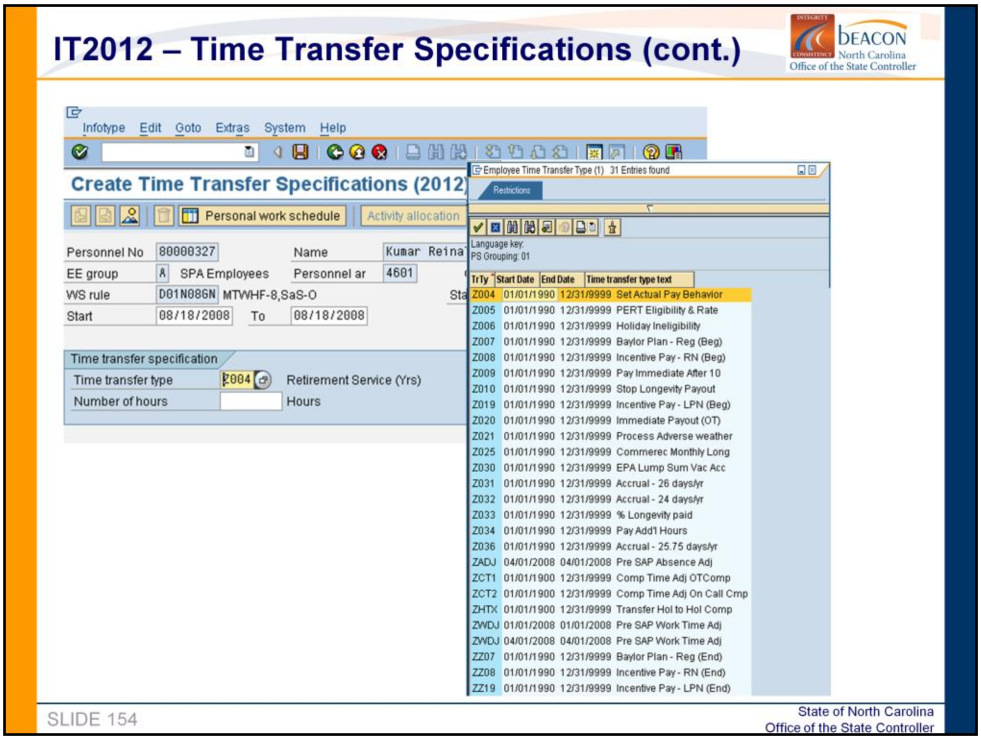
Applicable for “positive time/exception pay” employees. This subtype record will cause the generation of “leave without pay” wage types to fill the difference between reported hours and planned hours. In effect this causes the employee to be treated as a “positive time/actual pay” employee.

Z005 - PERT Eligibility and Rate

Applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums.

Z006 - Holiday Ineligibility

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.



Notes

Z007 - Baylor Plan – Reg (Beg)
ZZ07 - Baylor Plan – Reg (End)
Applicable RNs working under a regular Baylor Plan contract.

Z018 - Baylor Plan + Bonus (Beg)
ZZ18 - Baylor Plan + Bonus (End)
Applicable RNs working under a Baylor Contract with a bonus at the completion of the contract.

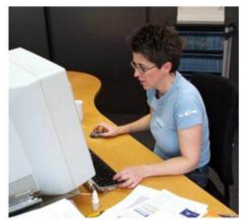
Z008 - Incentive Pay – RN (Beg)
ZZ08 - Incentive Pay – RN (End)
Applicable RNs working under an Incentive Pay contract.

Z019 - Incentive Pay – LPN (Beg)
ZZ19 - Incentive Pay – LPN (End)
Applicable LPNs working under an Incentive Pay contract

Z009 - First 10 hrs Comp
Applicable for subject employees who have a position with a Overtime Eligibility (IT9005) record that does not indicate “pay immediately”. This subtype record will cause the additional hours worked beyond 50 in a week to be “paid immediately”. The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

Exercise 9.3

- You have received verification that the position settings should be revised on the Information & Communication Specialist II position.
- Beginning today, the position will be eligible for Overtime Compensation and Holiday Payout.



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State of North Carolina
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Notes

Lesson Review

BEACON North Carolina Office of the State Controller

In this lesson, you learned to:

- Identify how PA Actions affect employee time, benefits and pay
- Describe how a work schedule assignment affects an employee's pay
- Revise a work schedule
- Create a substitution
- Revise the time settings on a position
- Explain when to notify payroll regarding changes in settings

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Notes


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Lesson 6: Separating Employees
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Lesson 8: Updating Benefits Adjustments
Lesson 9: Connecting the BEACON Dots
Lesson 10: HR Reports Overview
Lesson 11: Course Review
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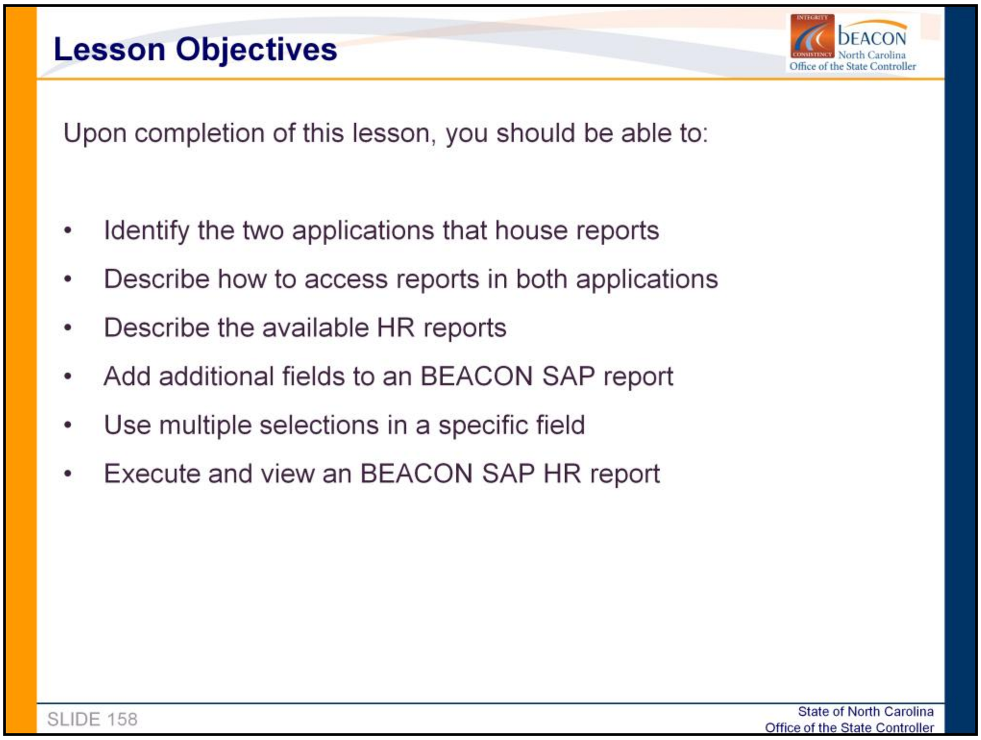
Notes


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Identify the two applications that house reports
• Describe how to access reports in both applications
• Describe the available HR reports
• Add additional fields to an BEACON SAP report
• Use multiple selections in a specific field
• Execute and view an BEACON SAP HR report
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Notes

Where to Find Reports

SAP	BI
Real time data*	Data at a point in time *
Transactional reports	Analytical reports
Performance considerations for large data volumes	Aggregation of large data volumes
Data by functional area	Merge disparate data
Current data only	Include history data with current data

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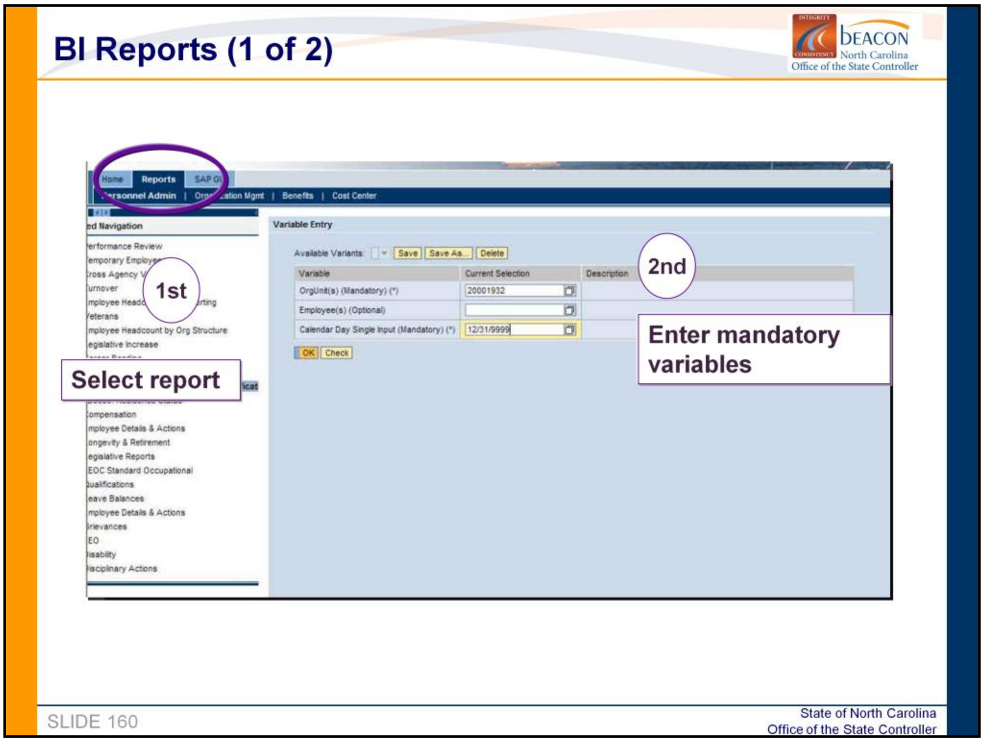
Notes

Human Resources reports are housed in both BEACON SAP and Business Intelligence (BI). You can see in the comparison above, the advantages of each reporting system.

You can see a list of BI reports (and a description) by accessing the applicable job aid from BEACON University. A list of the SAP HR reports is available from the SAP reports menu.

For more information on reports, see the online reporting class.

* Many BEACON SAP transactions are posted at the time the entry is made. Therefore, when you run a BEACON SAP report, for example for today, the data is current including today's data. Data is loaded into BI daily; therefore when you run a report in BI, for example for today, you are actually viewing yesterday's data.



Notes

If you have security access to run BI reports, you will see a Reports tab on your portal.

On the initial screen, you first select the report name in the left panel.

Next, enter the mandatory variables (Org Unit and date).

Notes

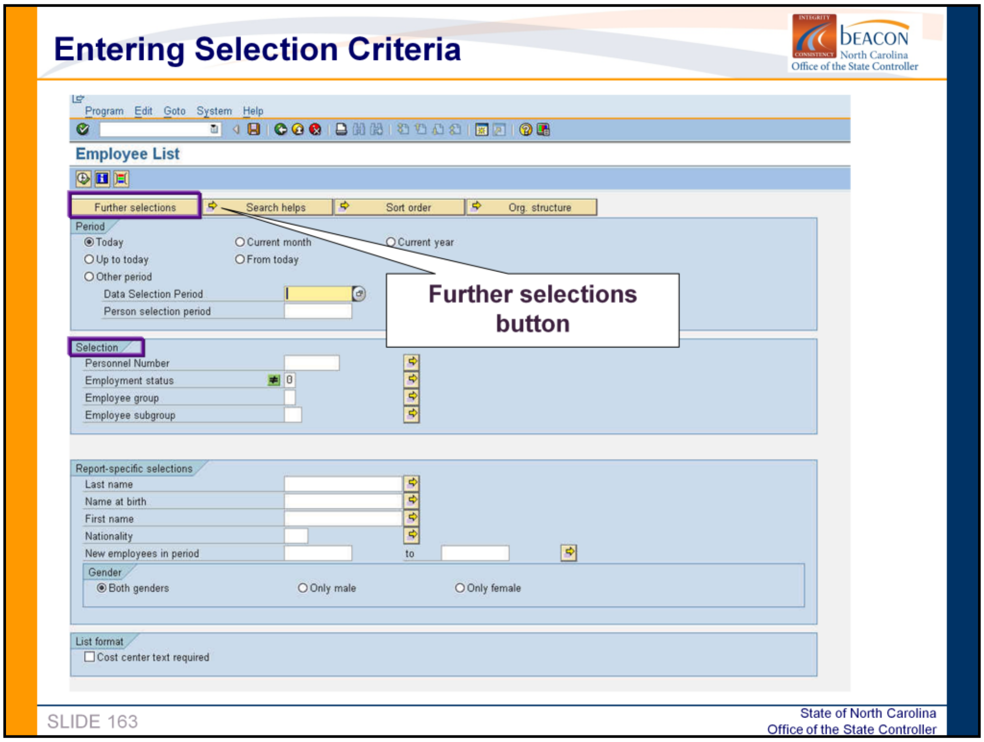
On the next screen, you can literally drag and drop any of the fields from the free characteristics list onto the report. The rows and columns above the free characteristics section automatically default into the report.

You can print the report, write comments, send to someone else, or export to an Excel spreadsheet.

Notes

The BEACON SAP reports are accessed via the Easy Access screen, or by using the applicable transaction code. The reports are categorized according to employee, Organizational Management, documents, administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.



Notes

In BEACON SAP, the first screen of each report allows you to specify the data you want to view in a report. The type of fields that display on the selection screen differ for each report.

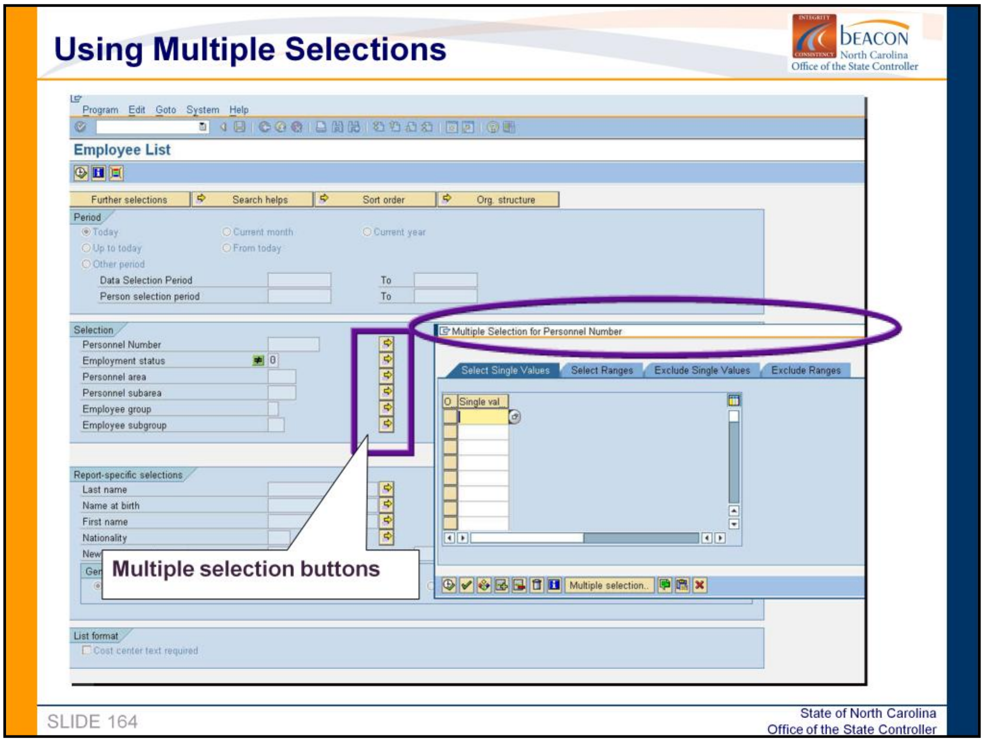
NOTE! You should never run the report without specifying the selection criteria. If you do not specify selection criteria, the BEACON SAP system must search through the entire database for the employees to which you have security access. If several people are running reports at the same time without any selection criteria, the capacity of the BEACON SAP reporting system is unnecessarily taxed which could result in a slow response.

BEACON SAP reports have many options and functions. In this class, we only cover a few of them. The selection screen includes:

- **Period**: Select specific time frames that you want included in the report. To specify a specific date (or range), you must select the *other period* radio button, and then enter the dates.

- **Selection**: In this area, you select the specific criteria you want included on the report, for example, personnel area, employee status, just to name a few.

- **Further selections button**: Use this function if you want to add, or remove fields to the *Selection* area. Observe in the illustration, the *Personnel Area* and *Personnel Subarea* fields are not present in the Selection area. You can use the Further selections button to add those fields to the screen.



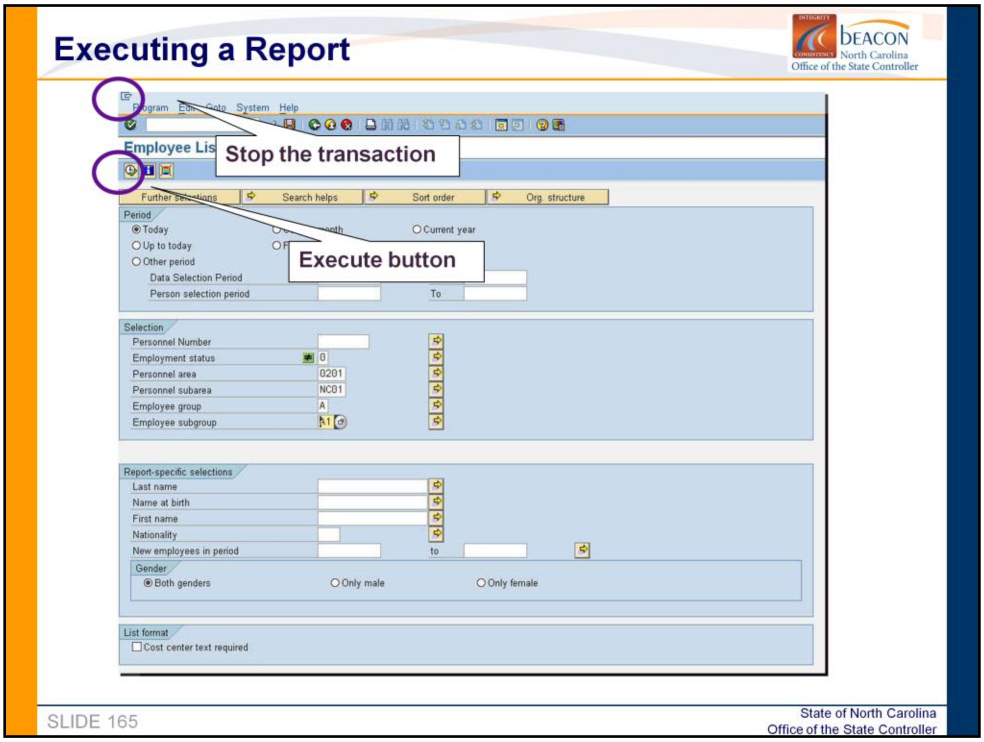
Notes

The yellow arrows beside each field are called *multiple selection* buttons. When you click the arrow, a new window is displayed. On that window, you can use the tabs to indicate :

- Additional single criteria
- A range of criteria
- Single criteria to exclude
- A range of criteria to exclude

Observe in the illustration above, that the Selection button was used to add the Personnel Area and Personnel Subarea fields and they now display on the screen as fields to be used for selection criteria.

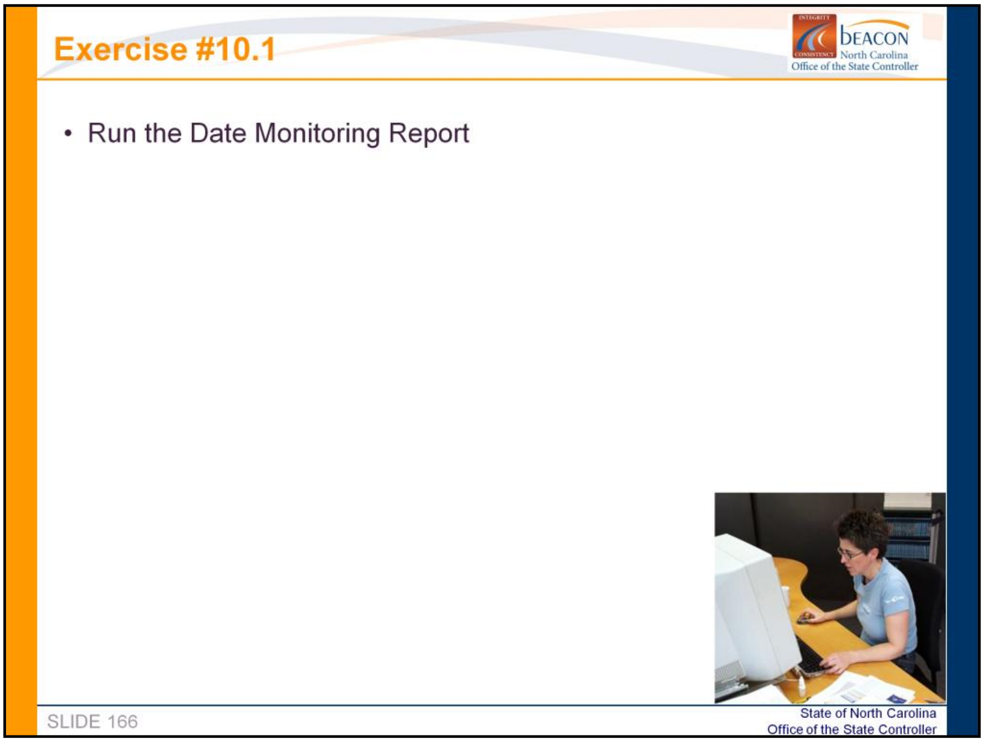
Entering the appropriate selection criteria is key to getting accurate report results. For example, if you narrow your selection criteria too small, you may get a message that there are “no values”.



Notes

When you have entered all of the selection criteria, click the Execute button to run the report.

NOTE: Sometimes when you are running a report, or performing other transactions, the system may display to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.



Notes

The Date Monitoring Report can be run from the SAP Easy Access screen via the following menu:

Select SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee > Date Monitoring (S_PH0_48000450).

In addition, you can run a report on due tasks in BI. The report, B0099 – Employee Deadline Dates (illustrated below).

B0099: Employee Deadline Dates

Information | Print Version | Export to Excel

Org Unit		Original Hire Date	Position		Deadline Type	End Date
20001723	DOT IT/ENTER SVCS/INFRASTRUCTURE SVCS	01/12/2008	60088805	It Manager Systems	End of probation	10/12/2008
			60088813	It Manager Systems	End of probation	10/12/2008
20001731	DOT IT/ENTER SERVICES/PROG MGT SERVICES	01/12/2008	60015192	Information Technology Director	End of probation	10/12/2008
20001744	DOT IT/PROG MGT SERVICES/PROJ MGT	01/12/2008	60015273	Business And Technology Applic Analyst	End of probation	10/12/2008

Exercise #10.2

- Run the Work Flow report for PA
  - ZPA0189

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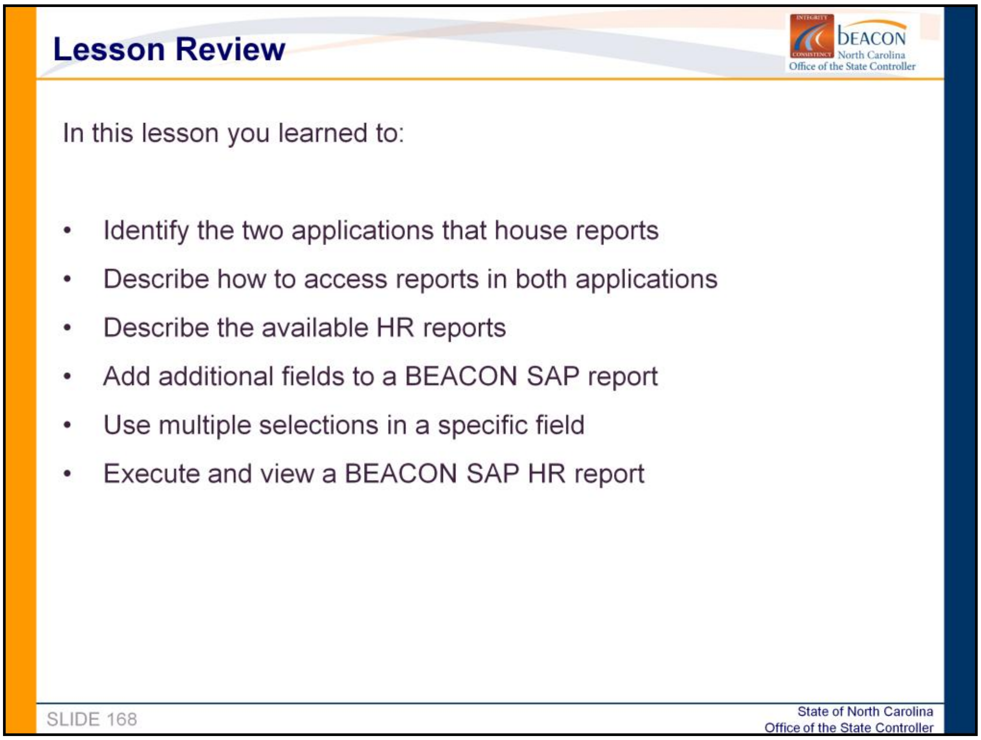
Notes


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson you learned to:
• Identify the two applications that house reports
• Describe how to access reports in both applications
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Course Review

BEACON North Carolina Office of the State Controller

In this course, you learned to:

- Recall terms and concepts from the *Personnel Administration Terms, Concepts and Display Data* course
- Create new records associated with the life cycle of an employee
- Describe the process for the various actions
- Modify existing employee data
- Explain how Personnel Administration Actions affect Time, Benefits and Payroll
- Identify the options to access reports

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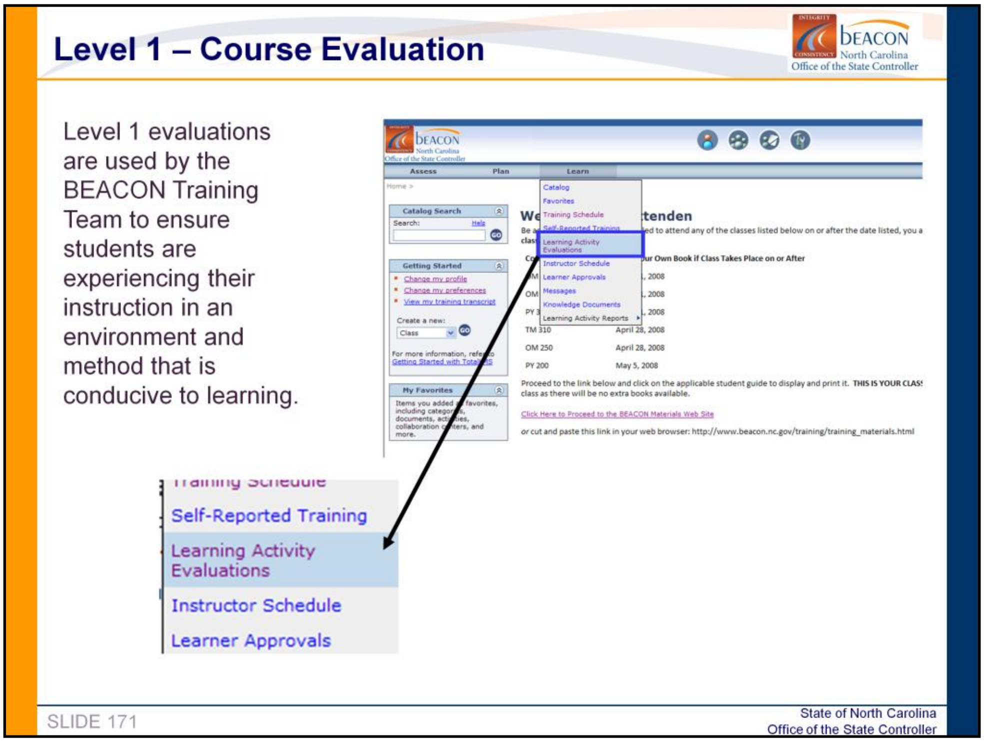
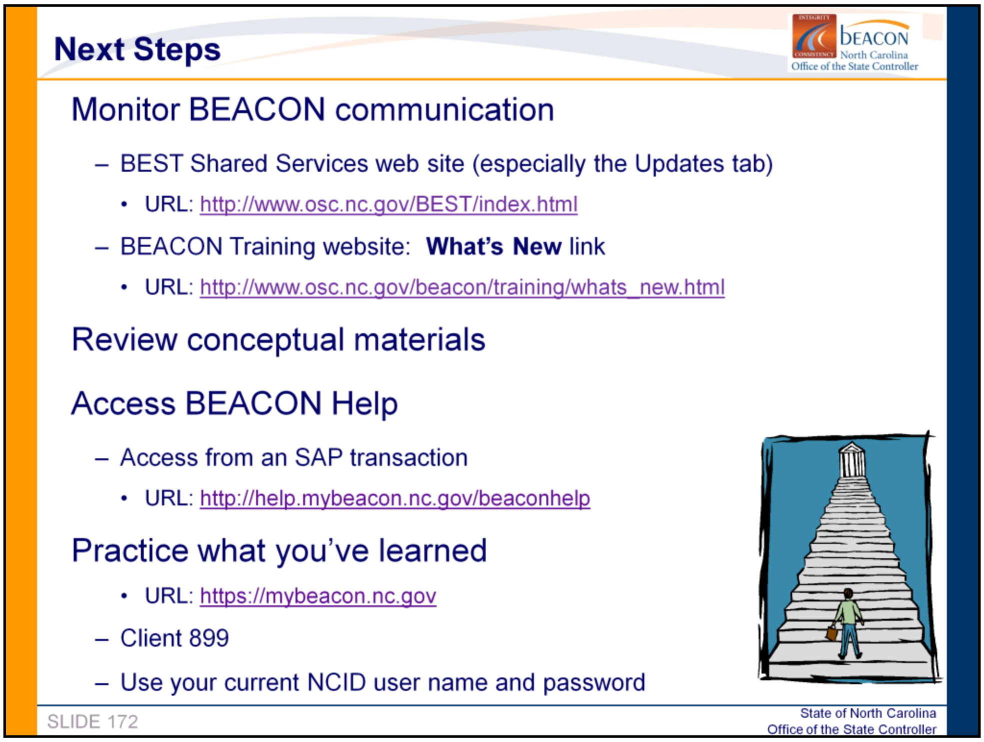


Notes

Level 1 Evaluations

The Level 1 class evaluation is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.



Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.


Conclusion
BEACON
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CONGRATULATIONS
You have completed the course
Please complete your course evaluation!
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Notes